BRITISH COLUMBIA

BC STATS

Ministry of
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Tourism Sector Monitor ◆ January 2004

Highlights

Room Revenue

The month of **October** saw room revenues rebound (+2.9%, seasonally adjusted), more than offsetting losses registered in the previous month (-1.3%). This was the second strongest advance since the beginning of 2003. This overall increase came from many sources, as revenues rose in all accommodation types and almost all development regions.

Revenues rebounded in October

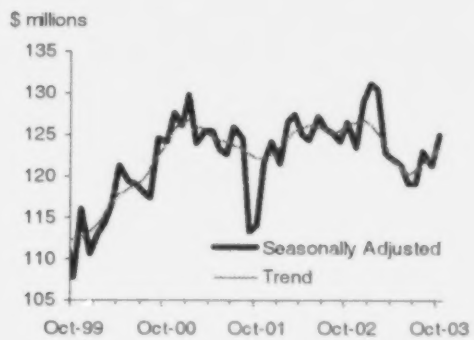


Table 1. Room Revenue* Summary

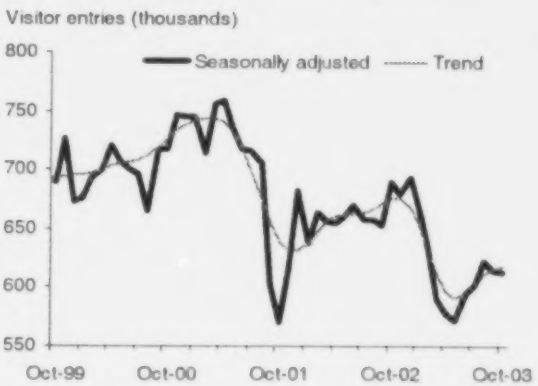
Accommodation Type	Oct 03 ($000)	Sept 03 ($000)	% change
Total	124,943	121,408	2.9
Hotels	92,434	89,923	2.8
Motels	16,004	14,583	9.7
Other Acc.	17,246	17,113	0.8
Regions (Top 3 performers)			
Cariboo	3,821	3,453	10.7
Kootenay	6,153	5,691	8.1
Vancouver Island/Coast	23,599	22,410	5.3

**Seasonally adjusted room revenue*

Visitor Entries

In contrast to revenues, the number of travellers entering Canada through BC borders decreased (-0.8%, seasonally adjusted) in **October**. Entries from the US fell (-1.1%) for a second consecutive month. Entries from overseas continued to improve (+0.5%), but at a slower pace.

Visitor entries declined in October



Other Indicators

After falling for seven straight months on a year-over-year basis, hotel occupancy rates edged up (+0.4 percentage point, unadjusted) in **October** on a year-over-year basis. Vehicle traffic over the Coquihalla highway rose (+3.1%) in **October** 2003 compared to October 2002 after declining in the previous three months. The number of vehicles on the ferries was up (+0.7%) on a year-over-year basis but passenger traffic was down (-0.8%).

Note to readers...

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Tourism Trends

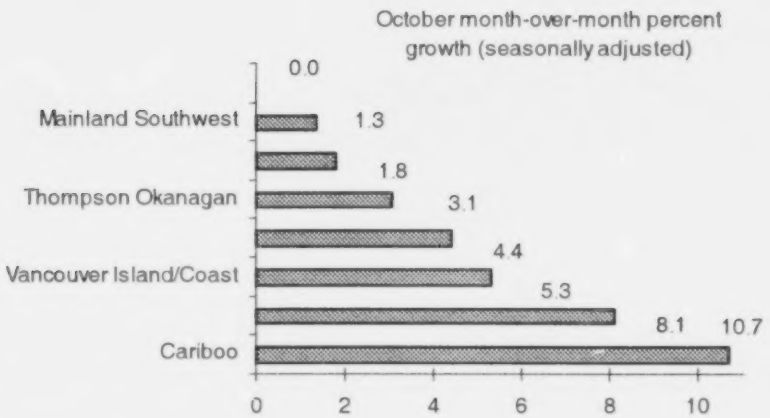
Room Revenue

Room revenues rebounded (+2.9%, seasonally adjusted) in **October** as accommodation properties in the province continued to recover from a downturn earlier in the year. October's increase followed even stronger growth in August (+3.3%), and more than offset a downturn that occurred in September.

An increase in revenues occurred in almost all development regions

Vancouver Island/Coast saw revenues rise (+5.3%) for the third time in the last four months. This region, the second largest in BC, contributed significantly to the overall increase in revenues. Mainland/Southwest (+1.3%) also pushed up BC revenues. In addition, regions that were likely affected by the forest fire situation in the summer of 2003 showed a strong increase in room revenues. Revenues in Cariboo (+10.7%), Kootenay (+8.1%) and Thompson-Okanagan (+3.1%) increased significantly. The only region where revenues did not increase in October was North Coast (0.0%).

Most development regions saw an increase in room revenues in October



October's rise was spread over all accommodation types. The top performer was motel properties, where revenues surged (+9.7%) after dropping (-2.4%) in September. Hotels (+2.8%) also generated more revenues in **October** after declining (-1.7%) the previous month. The miscellaneous (+0.5%) and vacation rentals (+1.0%) categories saw smaller increases.

All types of establishments generated more revenues in October

Visitor Entries

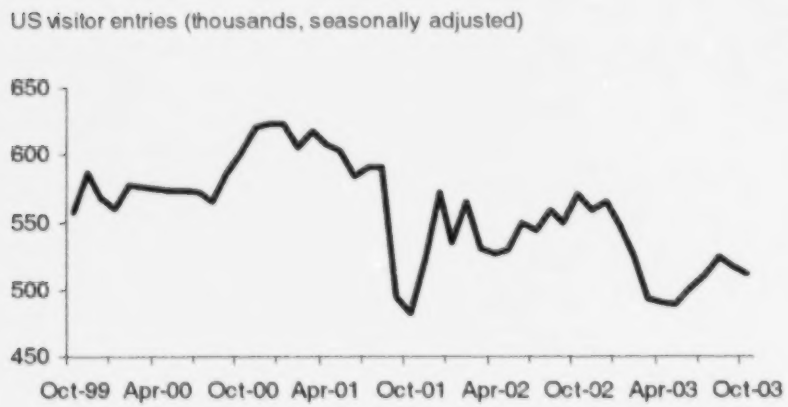
Visitor entries decreased for a second month in a row in October

The number of visitors entering Canada via BC decreased in **October** (-0.8%, seasonally adjusted) for a second consecutive month. Since room revenues increased and visitor entries did not, this suggests that international travellers may have increased their spending in BC or that there was a rise in domestic travel.

The overall decline was due to fewer same-day trips by travellers from the US

A drop (-1.2%) in the number of US visitors on same-day trips to BC was the main reason for the overall decrease in visitor entries in **October**. The strong position of the Canadian dollar relative to the US dollar may have contributed to this downturn. The number of US visitors on overnight trips to BC in **October** remained approximately the same (-0.1%) as in September. Both same-day and extended trips from the US remained lower than in 2002.

US entries continued to fall in October



Entries from overseas continued to improve (+0.5%) in **October** for a fifth consecutive month. However, this was the smallest advance since overseas entries started to rebound in June. Entries from Asia continued to rise strongly (+4.0%) in **October**. In particular, entries from Japan (+13.0%) and Taiwan (+26.9%) continued to surge. These bright performances were partially offset by a slump in visitor entries from Hong Kong (-8.7%) and South Korea (-2.1%).

Entries from Oceania (Australia and the South Pacific, -16.2%) plunged in **October**, more than offsetting strong performances in September (+8.4%) and August (+2.7%). Entries from Europe advanced slowly (+0.5%) in **October** and have not changed substantially since the beginning of the summer.

Table 2. Traveller Entries (October, seasonally adjusted)

	Oct-03 ('000)	Sep-03 ('000)	% chg from Sep-03
American visitors			
Total	511	517	-1.1
Same-day	221	224	-1.2
Overnight	291	291	-0.1
Overseas visitors			
Total	102	102	0.5
Europe	33	32	0.5
UK	17	17	-0.7
Asia	55	53	4.0
Japan	18	16	13.0
Taiwan	9	7	26.9
Oceania	9	11	-16.2
Canadian re-entries			
Total	621	629	-1.3
From overseas	85	79	7.4
From US same-day auto	329	328	0.2

(BC STATS & Statistics Canada)

Other Tourism Indicators (Up to October 2003)

After a persistent downturn, some tourism indicators were finally positive on a year-over-year basis in October

After declining for three months, vehicle traffic over the Coquihalla highway rose (+3.1%) in **October** compared to the same month in 2002.

The number of vehicles on the ferries was up (+0.7%) while the number of passengers fell (–0.8%) on a year-over-year basis in **October**. The number of passengers through Victoria Airport surged in **October** compared to the same month in 2002 (+15.5%). This jump was the highest since April 1998.

After falling for seven straight months on a year-over-year basis, hotel occupancy edged up in **October** (+0.4 percentage point, unadjusted) to reach 56.8%. For the eighth consecutive month, average room charges were down (-2.5%, to $100.28) in **October** compared to October 2002. Accommodation properties seem to be maintaining lower prices in order to attract travellers and possibly offset the strong and quick appreciation of the Canadian dollar relative to its American counterpart.

In **October**, the cost of a US dollar was $1.32 Canadian, down 4 cents from September. Relative to the US currency, this was the strongest position of the Canadian dollar since January 1994.

Restaurant and tavern receipts rose (+1.8%, seasonally adjusted) in **October,** reflecting higher receipts (+2.0%) at food service establishments. Receipts at drinking places dropped (-2.4%).

Table 3. Other Tourism Indicators (October, unadjusted)

	Reference period	Total	Change from year ago
Hotel Industry			
Occupancy rate	Oct-03	56.8%	0.4 pp.
Average room charge	Oct-03	$100.28	-2.5%
(Pannell Kerr Forster)			
Airport Passengers		(000s)	(%)
Vancouver International Airport			
Total traffic	Oct-03	1,152	-3.8
US	Oct-03	248	-5.7
Other International	Oct-03	267	-8.9
Canada	Oct-03	636	-0.8
(YVR)			
Victoria International Airport			
Total traffic	Oct-03	111	15.5
(Victoria Airport Authority)			
Restaurant Receipts		($ millions)	(%)
Full service	Oct-03	241	19.6
Limited service	Oct-03	162	8.8
Drinking places	Oct-03	22	-7.2
(Statistics Canada)			
Transportation		(000s)	(%)
Coquihalla Highway			
Passenger Vehicles	Oct-03	209	3.1
(Ministry of Transportation & Highways)			
BC Ferries			
Vehicle Volume	Oct-03	672	0.7
Passenger Volume	Oct-03	1,657	-0.8
(BC Ferries)			
Exchange Rates		Cdn $	Change from year ago
US $	Oct-03	1.322	-0.256
UK Pound	Oct-03	2.220	-0.238
Japanese Yen	Oct-03	0.012	-0.001
Australian $	Oct-03	0.919	0.050
(Statistics Canada)			

note: pp. percentage points

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues increased at a slower pace (+0.5%) in **November**, with a mixed performance across development regions and accommodation types.

Room revenues increased again in November, but at a slower pace

A caution about preliminary numbers

Because companies file their hotel room taxes with a varying lag, the initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a two-month lag. However, we also briefly report "preliminary data" with a one-month lag.

How accurate is the preliminary data? Our preliminary numbers—reported in the "look ahead" box—have typically been off by less than a half percentage point. The preliminary figures, in other words, seem basically on the mark, though they should be used with caution (a more detailed analysis of their accuracy will be undertaken in the future).

Visitor Entries

The number of travellers entering Canada through BC borders fell (-1.1%, seasonally adjusted) for a third consecutive month in **November**. Again, a drop (-1.8%) in US entries was the main reason for the overall decline. Entries from overseas continued to increase steadily (+2.2%).

Visitor entries were down again in November

Other Tourism Indicators

Hotel occupancy moved up again in **November** (+2.1 percentage points) compared to the same month in 2002. At the same time, average room charges were still down (-3.3% to $91.15) on a year-over-year basis, marking a ninth consecutive decline. These were the lowest average room charges registered since November 1998 ($88.86) and the longest sequence of year-over-year declines in at least 15 years.

Passenger traffic through the Vancouver Airport increased (+2.2%, year-over-year) in **November** for the first time since January 2003. Domestic (+3.3%) and transborder (+2.4%) traffic was up strongly.

In **November**, the cost of a US dollar was $1.31 Canadian, down 1 cent from October. Relative to the US currency, this is the strongest position of the Canadian dollar since August 1993.

Special Focus: The North Coast Region

Introduction

The North Coast region is located in the northwest part of British Columbia, lying along the Pacific Ocean. North Coast is made up of two regional districts, Skeena-Queen Charlotte and Kitimat-Stikine. In the Skeena-Queen Charlotte district, tourism activity accrues mainly from the Prince Rupert urban centre. The urban centre of Terrace is the core of tourism activities in the Kitimat-Stikine district.

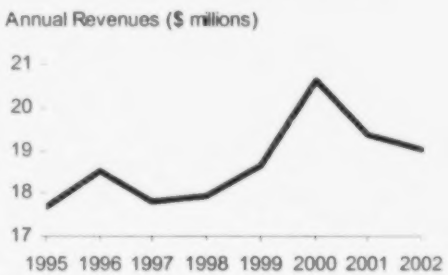
North Coast is sparsely populated, and tourism activities are dependent on visitors travelling through the region on their way to other destinations such as Alaska or southern BC. Moreover, ferry traffic plays an important role. Some parts of the region are only accessible by water or air. BC Ferries (from Port Hardy and Skidegate) and the Alaskan Ferry system use Prince Rupert as a terminus, which supports accommodation and food services. The North Coast also benefits from cruising and sailing activities near by the Inside Passage.

Tourists also come directly to North Coast to enjoy their vacations. This region offers travellers a variety of activities. Freshwater fishing in the Skeena River and saltwater fishing, particularly off the Queen Charlottes, are key attractions, as are natural and historical sites in the area. Boating, canoeing, windsurfing, kayaking, wildlife viewing such as whale watching are other activities the region has to offer. The region gives visitors the opportunity to explore mountains and lakes in provincial parks such as Prudhomme and Diana Lake.

North Coast Tends to Underperform BC in terms of Room Revenues

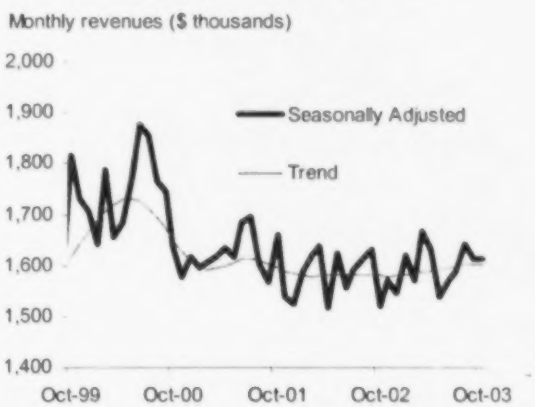
Over the last decade, room revenues generated by accommodation providers in the North Coast have increased relatively slowly. Between 1995 and 2002, revenues advanced 7.5% to reach $19.0 million in North Coast compared to 50.7% growth for BC as a whole. Still, North Coast had a successful period between 1998 and 2000. In 2000 in particular, revenues rose 10.5% to reach $20.6 million, the highest level of revenues since 1995. In terms of revenues generated, North Coast outperformed the province (+8.5%) only in 2000. Thereafter, accommodation providers had a more difficult period, as revenues dropped in 2001 (-6.2%) and 2002 (-1.7%).

North Coast room revenues have increased slowly over time



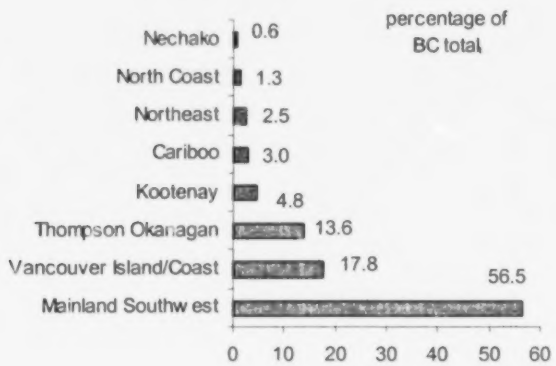
After hitting a trough in October 2002, monthly room revenues have started to rebound in 2003.

Revenues have experienced slow growth in 2003



Due to its relatively small size, movements in North Coast revenues do not generally reflect variations in revenue observed in the province as a whole. North Coast generated less room revenues than any other region except Nechako in 2002. The region was responsible for a very small share (1.3%) of the $1.5 billion generated in BC room revenues in 2002.

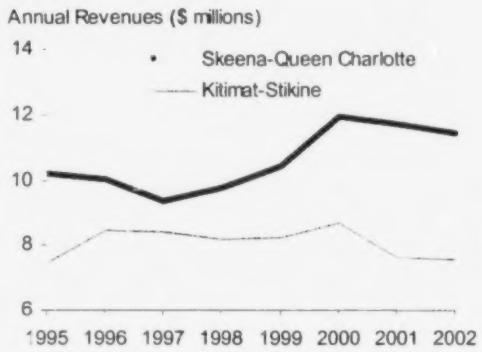
North Coast accounted for the second smallest portion of provincial room revenues in 2002



Regional Districts and Urban Centres

The Skeena-Queen Charlotte region was responsible for almost two-thirds (60.2% or $11.5 million) of revenues generated in North Coast in 2002. The Prince Rupert urban centre generated the most revenue (59.8%) in this region in 2002. The Terrace urban centre generated approximately the same share of revenues (58.0%) in the Kitimat-Stikine region during the same period. Together, Terrace and Prince Rupert accounted for 59.1% of North Coast revenues in 2002, which was lower than seven years ago (65.2% in 1995).

Since 1995, the Skeena-Queen Charlotte region has performed better than the Kitimat-Stikine region



Accommodation Properties Stable While Room Numbers Edged Down

There were 90 accommodation properties in the North Coast region in 2002. Approximately one-third (32.2%) of them were motels. Since North Coast is a popular destination for fishing, a large proportion (17.8%) of accommodations is comprised of fishing lodges. There were also 22 hotels in North Coast in 2002. Most of them (19) were small hotels (those with 1-76 rooms).

The number of accommodation properties was stable between 1995 (89) and 2002 (90). In contrast, new properties were built in larger development regions, contributing to the overall BC increase.

North Coast was the only region in BC to register a decrease in the number of rooms between 1995 and 2002. The number of rooms moved down from 2,336 in 1995 to 2,094 in 2002.

Table 1: Seasonally Adjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
1997	205,480	665,314	146,520	44,803	43,225	17,800	9,301	25,142	1,157,586
1998	219,677	686,970	155,799	47,223	42,381	17,923	8,932	27,183	1,206,090
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
Quarterly data									
2002 Q2	67,763	214,672	49,657	17,737	10,769	4,700	2,120	9,212	376,629
2002 Q3	65,949	211,817	51,803	18,080	11,068	4,835	2,155	9,261	374,969
2002 Q4	67,756	213,895	52,563	17,383	11,058	4,633	2,359	9,386	379,033
2003 Q1	68,882	211,720	55,716	19,066	10,373	4,855	2,361	11,508	384,481
2003 Q2	67,086	195,642	52,854	17,740	10,779	4,739	2,211	11,235	362,288
2003 Q3	67,144	198,301	51,741	17,395	10,496	4,844	2,178	11,525	363,625
Monthly data									
Aug-02	22,246	70,264	17,387	6,261	3,789	1,614	701	2,973	125,234
Sep-02	21,690	69,494	17,192	6,053	3,751	1,631	740	3,507	124,060
Oct-02	22,116	71,482	17,595	5,769	3,779	1,519	839	3,470	126,570
Nov-02	22,430	69,095	17,295	5,538	3,711	1,569	778	3,102	123,518
Dec-02	23,210	73,317	17,673	6,076	3,568	1,545	742	2,814	128,945
Jan-03	23,022	72,359	20,101	6,279	3,494	1,619	753	3,471	131,097
Feb-03	23,203	73,451	17,959	6,557	3,261	1,571	861	3,611	130,473
Mar-03	22,657	65,910	17,656	6,230	3,617	1,666	748	4,427	122,911
Apr-03	22,847	65,615	17,620	6,057	3,584	1,632	740	3,922	122,017
May-03	22,389	65,862	17,570	5,829	3,568	1,537	748	3,744	121,247
Jun-03	21,850	64,165	17,665	5,854	3,627	1,571	723	3,569	119,025
Jul-03	21,983	64,307	17,196	5,950	3,519	1,589	717	3,900	119,162
Aug-03	22,752	67,436	17,279	5,755	3,524	1,642	728	3,939	123,055
Sep-03	22,410	66,558	17,265	5,691	3,453	1,613	733	3,686	121,408
Oct-03	23,599	67,444	17,795	6,153	3,821	1,613	765	3,752	124,943
Month-over-month growth rates									
Aug-02	1.1	-2.5	0.9	8.6	7.4	1.4	-1.9	6.9	-0.4
Sep-02	-2.5	-1.1	-1.1	-3.3	-1.0	1.0	5.5	18.0	-0.9
Oct-02	2.0	2.9	2.3	-4.7	0.7	-6.8	13.5	-1.1	2.0
Nov-02	1.4	-3.3	-1.7	-4.0	-1.8	3.3	-7.3	-10.6	-2.4
Dec-02	3.5	6.1	2.2	9.7	-3.9	-1.5	-4.7	-9.3	4.4
Jan-03	-0.8	-1.3	13.7	3.3	-2.1	4.8	1.5	23.4	1.7
Feb-03	0.8	1.5	-10.7	4.4	-6.7	-3.0	14.3	4.0	-0.5
Mar-03	-2.4	-10.3	-1.7	-5.0	10.9	6.1	-13.1	22.6	-5.8
Apr-03	0.8	-0.4	-0.2	-2.8	-0.9	-2.1	-1.0	-11.4	-0.7
May-03	-2.0	0.4	-0.3	-3.8	-0.4	-5.8	1.0	-4.6	-0.6
Jun-03	-2.4	-2.6	0.5	0.4	1.7	2.2	-3.3	-4.7	-1.8
Jul-03	0.6	0.2	-2.7	1.6	-3.0	1.2	-0.8	9.3	0.1
Aug-03	3.5	4.9	0.5	-3.3	0.1	3.3	1.5	1.0	3.3
Sep-03	-1.5	-1.3	-0.1	-1.1	-2.0	-1.8	0.7	-6.4	-1.3
Oct-03	5.3	1.3	3.1	8.1	10.7	0.0	4.4	1.8	2.9

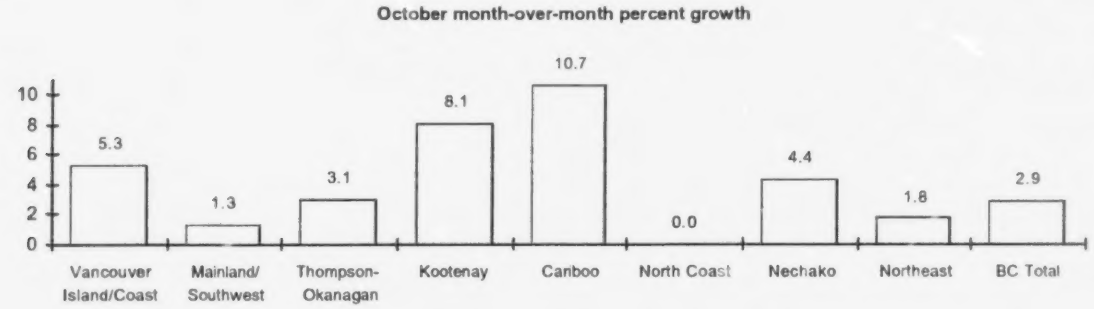


Table 2: Seasonally Adjusted Room Revenue by Accommodation Type ($000)

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			
1997	368,654	147,392	220,648	151,452	167,521	54,331	47,588
1998	366,256	158,023	237,901	163,131	166,418	62,152	52,208
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
Quarterly data							
2002 Q2	118,126	47,817	73,933	43,637	44,778	27,984	21,239
2002 Q3	117,154	46,495	74,039	43,996	45,674	27,742	21,343
2002 Q4	117,065	46,876	74,574	44,139	44,963	29,111	22,820
2003 Q1	115,343	46,309	74,556	44,223	45,786	29,722	24,820
2003 Q2	106,418	43,623	72,789	43,346	45,272	29,362	22,603
2003 Q3	107,966	44,244	73,494	43,164	44,391	28,551	23,164
Monthly data							
Aug-02	38,724	15,833	24,781	14,831	15,463	9,244	7,377
Sep-02	38,809	14,919	24,532	14,461	14,992	9,636	7,010
Oct-02	40,022	15,304	24,676	14,802	15,230	9,996	7,455
Nov-02	36,761	15,192	24,753	14,909	14,756	9,530	7,463
Dec-02	40,281	16,380	25,145	14,429	14,977	9,586	7,902
Jan-03	40,474	15,786	25,237	14,960	15,147	9,909	8,055
Feb-03	39,066	15,675	25,049	14,927	15,402	9,929	8,549
Mar-03	35,803	14,849	24,269	14,335	15,236	9,884	8,216
Apr-03	35,737	14,917	24,467	14,412	15,209	9,716	7,273
May-03	36,031	14,554	24,159	14,546	14,926	9,969	7,657
Jun-03	34,650	14,152	24,164	14,389	15,137	9,677	7,673
Jul-03	34,676	14,372	24,153	14,285	14,861	9,699	7,624
Aug-03	37,130	14,972	24,750	14,606	14,948	9,649	7,629
Sep-03	36,161	14,899	24,591	14,273	14,583	9,203	7,911
Oct-03	36,846	15,447	25,329	14,812	16,004	9,292	7,954
Month-over-month growth rates							
Aug-02	-2.3	0.6	0.2	0.9	1.6	4.3	6.0
Sep-02	0.2	-5.8	-1.0	-2.5	-3.0	4.2	-5.0
Oct-02	3.1	2.6	0.6	2.4	1.6	3.7	6.3
Nov-02	-8.1	-0.7	0.3	0.7	-3.1	-4.7	0.1
Dec-02	9.6	7.8	1.6	-3.2	1.5	0.6	5.9
Jan-03	0.5	-3.6	0.4	3.7	1.1	3.4	1.9
Feb-03	-3.5	-0.7	-0.7	-0.2	1.7	0.2	6.1
Mar-03	-8.4	-5.3	-3.1	-4.0	-1.1	-0.5	-3.9
Apr-03	-0.2	0.5	0.8	0.5	-0.2	-1.7	-11.5
May-03	0.8	-2.4	-1.3	0.9	-1.9	2.6	5.3
Jun-03	-3.8	-2.8	0.0	-1.1	1.4	-2.9	0.2
Jul-03	0.1	1.6	0.0	-0.7	-1.8	0.2	-0.6
Aug-03	7.1	4.2	2.5	2.3	0.6	-0.5	0.1
Sep-03	-2.6	-0.5	-0.6	-2.3	-2.4	-4.6	3.7
Oct-03	1.9	3.7	3.0	3.8	9.7	1.0	0.5

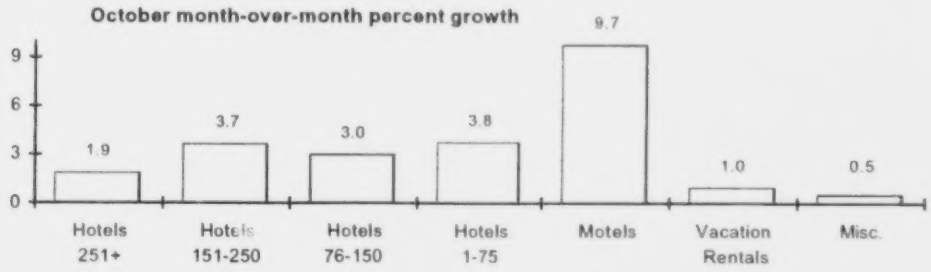


Table 3: Unadjusted Room Revenue by Development Region

Development Region	Revenue				Properties		Rooms	
	($000)		% chg from		(#)	# chg from	(#)	# chg from
	Oct-03	YTD 03	Oct-02	YTD 02	Oct-03	Oct-02	Oct-03	Oct-02
Vancouver Island/Coast								
Total - all accommodation types	**19,868**	**248,344**	**6.8**	**1.2**	**409**	**2**	**15,469**	**301**
Fishing lodges	281	8,830	3.7	7.6	15	0	406	29
Total - Hotels	13,285	154,109	9.1	-1.8	136	-1	8,733	105
76+ Rooms	9,193	104,044	11.8	-2.6	40	2	5,223	164
1-75 Rooms	4,092	50,065	3.6	-0.2	96	-3	3,510	-59
Motels	2,455	32,287	0.7	0.7	121	-1	3,256	88
Vacation Rentals	1,800	29,131	2.4	9.9	68	9	1,299	92
Miscellaneous	2,048	23,988	9.4	11.2	69	-5	1,775	-13
Mainland/Southwest								
Total - all accommodation types	**52,270**	**709,574**	**-5.8**	**-5.3**	**403**	**3**	**35,660**	**-4**
Total - Hotels	48,780	635,533	-6.0	-5.6	228	-5	30,086	-242
251+ Rooms	27,025	349,904	-11.9	-6.5	32	0	12,719	0
151-250 Rooms	8,291	103,904	1.9	-7.0	28	-1	5,295	-201
76-150 Rooms	9,909	134,272	3.0	-3.2	76	-1	8,052	-71
1-75 Rooms	3,555	47,452	1.8	-1.7	92	-3	4,020	30
Motels	2,063	24,150	-5.4	-6.6	89	-5	2,862	-191
Vacation Rentals	889	30,899	-4.4	-7.4	46	6	1,780	42
Thompson/Okanagan								
Total - all accommodation types	**13,785**	**193,618**	**3.0**	**3.2**	**449**	**11**	**16,446**	**377**
Fishing lodges	166	1,859	-13.1	-5.4	14	-3	153	-25
Total - Hotels	8,247	102,499	0.7	3.2	100	1	7,170	205
76+ Rooms	6,601	76,255	1.3	3.2	39	2	4,736	235
1-75 Rooms	1,646	26,244	-1.6	3.2	61	-1	2,434	-30
Motels	4,514	58,327	10.3	0.3	237	5	7,262	242
Vacation Rentals	378	19,271	-6.8	8.8	51	9	955	-58
Miscellaneous	480	11,662	-4.0	11.9	47	-1	906	13
Kootenay								
Total - all accommodation types	**4,226**	**64,539**	**6.7**	**-0.4**	**204**	**4**	**6,397**	**102**
Total - Hotels	1,837	23,953	2.7	-1.9	45	-1	2,321	-1
76+ Rooms	1,025	13,269	15.7	1.6	11	1	1,101	80
1-75 Rooms	811	10,684	-10.0	-6.0	34	-2	1,220	-81
Motels	1,428	16,832	1.2	-10.2	102	-5	2,110	-125
Vacation Rentals	247	10,283	13.8	6.6	31	6	993	85
Cariboo								
Total - all accommodation types	**3,772**	**38,226**	**1.3**	**-4.0**	**146**	**-2**	**4,454**	**-99**
Fishing lodges	74	817	25.5	-4.3	11	1	69	1
Total - Hotels	2,044	20,370	1.8	-5.2	28	0	1,901	-93
Motels	1,428	13,602	5.4	-3.4	66	-1	2,107	40
Vacation Rentals	64	1,418	-27.6	4.9	24	-4	185	-47
Miscellaneous	161	2,019	-24.0	-1.1	17	2	192	10
North Coast								
Total - all accommodation types	**1,210**	**17,631**	**5.4**	**0.8**	**62**	**-1**	**1,762**	**27**
Total - Hotels	681	8,448	7.8	0.2	19	0	924	30
Motels	366	4,552	-5.6	-5.2	26	-1	715	-7
Nechako								
Total - all accommodation types	**954**	**7,929**	**-7.3**	**1.4**	**54**	**-4**	**1,197**	**-92**
Fishing lodges	123	538	-52.1	-23.6	12	-1	72	-8
Motels	510	4,476	6.6	8.8	24	-1	656	0

Table 3: Unadjusted Room Revenue by Development Region

Development Region	Revenue				Properties		Rooms	
	($000)		% chg from		(#)	# chg from	(#)	# chg from
	Oct-03	YTD 03	Oct-02	YTD 02	Oct-03	Oct-02	Oct-03	Oct-02
Northeast								
Total - all accommodation types	**3,470**	**39,537**	**8.9**	**19.2**	**66**	**-1**	**2,807**	**154**
Total - Hotels	1,485	16,257	12.7	9.5	18	-2	1,301	-45
Motels	1,173	10,049	39.9	25.1	33	1	999	98
Vacation Rentals	752	12,389	-25.5	25.8	11	0	416	101
British Columbia Total								
Total - all accommodation types	**99,554**	**1,319,398**	**-1.0**	**-1.9**	**1,793**	**12**	**84,192**	**776**
Fishing lodges	727	17,953	-12.9	4.9	59	-3	789	3
Total - Hotels	76,584	963,371	-2.1	-3.7	582	-10	52,790	-123
251+ Rooms	30,998	385,475	-8.7	-6.5	35	0	13,823	0
151-250 Rooms	13,230	160,422	1.6	-5.0	44	-1	8,231	-201
76-150 Rooms	20,407	262,654	4.3	-0.6	167	3	17,263	308
1-75 Rooms	11,949	154,819	1.8	-0.3	336	-12	13,473	-230
Motels	13,938	164,276	5.7	-0.9	698	-8	19,967	145
Vacation Rentals	4,210	104,152	-7.8	5.0	239	23	5,692	193
Miscellaneous	4,095	69,647	10.8	11.6	215	10	4,954	558

Table 4: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Oct-03	Revenue ($000) YTD 03	Revenue % change from Oct-02	Revenue % change from YTD 02	Properties (#) Oct-03	Properties # chg from Oct-02	Rooms (#) Oct-03	Rooms # chg from Oct-02
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	**12,000**	**140,735**	**5.3**	**-4.0**	**160**	**-4**	**7,902**	**109**
Total - Hotels	10,026	114,212	9.5	-4.8	68	0	5,348	67
76+ Rooms	7,809	86,564	12.6	-4.4	25	1	3,701	80
1-75 Rooms	2,217	27,648	-0.5	-5.9	43	-1	1,647	-13
Motels	976	12,836	0.6	-3.0	30	0	1,083	53
Vacation Rentals	252	4,914	-49.5	22.4	19	-1	240	-29
19 Cowichan Valley								
Total - All accommodation types	**625**	**7,326**	**6.0**	**8.0**	**32**	**3**	**636**	**18**
Motels	121	1,582	-8.4	0.7	15	1	296	12
21 Nanaimo								
Total - All accommodation types	**2,445**	**32,638**	**12.7**	**5.8**	**66**	**3**	**2,743**	**126**
Total - Hotels	1,314	16,050	8.9	3.2	21	1	1,452	37
Motels	514	6,769	7.2	2.8	22	0	611	2
Vacation Rentals	515	8,138	29.2	8.4	17	2	557	87
23 Alberni-Clayoquot								
Total - All accommodation types	**2,363**	**31,598**	**13.9**	**17.5**	**55**	**-2**	**1,354**	**-43**
Motels	189	3,576	-9.4	4.2	20	-1	410	-5
Vacation Rentals	790	10,417	9.2	12.3	11	2	270	13
Miscellaneous	746	8,056	27.2	32.4	12	0	196	6
25 Comox-Strathcona								
Total - All accommodation types	**1,828**	**26,227**	**6.2**	**4.9**	**56**	**1**	**1,722**	**6**
Motels	546	6,307	8.7	4.3	24	-1	668	26
27 Powell River								
Total - All accommodation types	**231**	**2,876**	**-25.3**	**-4.9**	**16**	**2**	**367**	**4**
43 Mount Waddington								
Total - All accommodation types	**270**	**5,150**	**12.7**	**12.4**	**19**	**1**	**656**	**97**
Total - Hotels	157	3,039	8.1	10.8	11	1	518	97
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	**2,949**	**31,502**	**5.7**	**0.7**	**62**	**1**	**2,458**	**8**
Total - Hotels	2,228	22,646	7.6	1.6	21	0	1,430	8
Motels	614	6,508	7.6	-0.3	35	1	911	7
15 Greater Vancouver								
Total - All accommodation types	**45,464**	**512,751**	**-6.1**	**-5.5**	**232**	**-2**	**25,816**	**-90**
Total - Hotels	43,552	482,683	-6.1	-5.4	163	-4	23,406	-25
251+ Rooms	24,548	264,275	-11.6	-5.6	25	0	9,956	0
151-250 Rooms	8,111	91,703	2.3	-7.5	25	0	4,753	-30
76-150 Rooms	8,156	94,147	1.2	-4.2	54	-1	5,846	-71
1-75 Rooms	2,736	32,559	5.4	-1.2	59	-3	2,851	76
Motels	1,134	14,195	-10.2	-11.3	36	-3	1,529	-137
Vacation Rentals	486	6,553	-1.4	1.8	14	0	510	-14
29 Sunshine Coast								
Total - All accommodation types	**270**	**3,517**	**-8.2**	**0.6**	**19**	**1**	**357**	**-21**
31 Squamish-Lillooet								
Total - All accommodation types	**3,587**	**161,803**	**-10.4**	**-5.8**	**90**	**3**	**7,029**	**99**
Total - Hotels	2,902	129,254	-14.3	-7.2	41	-2	5,167	-235
76+ Rooms	2,548	118,681	-13.3	-7.3	24	-1	4,501	-171
1-75 Rooms	354	10,573	-21.4	-6.1	17	-1	666	-64
Vacation Rentals	294	21,976	0.5	-10.9	22	2	1,128	45
Miscellaneous	228	8,910	87.8	41.6	18	4	517	315
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	**2,226**	**35,170**	**9.2**	**4.7**	**102**	**6**	**3,197**	**173**
Total - Hotels	1,268	17,480	5.8	4.1	17	1	1,260	90
Motels	832	14,165	16.0	2.6	70	2	1,668	66
33 Thompson-Nicola								
Total - All accommodation types	**3,725**	**50,065**	**-2.2**	**6.7**	**155**	**-4**	**5,413**	**-**
Fishing lodges	105	1,428	6.9	-3.2	11	-1	132	-4
Total - Hotels	1,830	22,457	-5.0	15.7	34	0	2,194	60
76+ Rooms	1,408	17,326	-6.8	17.2	12	1	1,389	80
1-75 Rooms	421	5,132	1.5	11.0	22	-1	805	-20
Motels	1,472	15,546	4.6	-2.2	76	0	2,265	-15
Vacation Rentals	97	6,798	-37.2	6.1	18	0	466	8
Miscellaneous	223	3,836	-0.4	2.9	16	-3	356	-44

Table 4: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	($000)		% change from		(#)	# chg from	(#)	# chg from
	Oct-03	YTD 03	Oct-02	YTD 02	Oct-03	Oct-02	Oct-03	Oct-02
35 Central Okanagan								
Total - All accommodation types	**4,869**	**58,734**	**8.0**	**-0.6**	**57**	**3**	**3,156**	**-17**
Total - Hotels	3,550	38,525	5.1	-0.7	18	-1	1,706	40
Motels	1,037	12,314	22.3	0.2	25	0	1,152	29
Vacation Rentals	175	5,839	31.2	5.1	12	4	159	-81
37 North Okanagan								
Total - All accommodation types	**1,125**	**17,150**	**9.3**	**8.8**	**43**	**5**	**1,525**	**175**
Total - Hotels	633	9,989	-8.6	-1.2	12	0	775	0
Motels	412	4,581	36.7	5.9	19	2	642	122
39 Columbia-Shuswap								
Total - All accommodation types	**1,840**	**32,500**	**-6.3**	**0.9**	**91**	**1**	**3,150**	**41**
Total - Hotels	965	14,048	-3.0	-1.1	19	1	1,235	15
Motels	762	11,721	-7.0	-1.3	47	1	1,535	40
Miscellaneous	93	3,669	-21.4	8.7	18	0	280	1
Kootenay								
01 East Kootenay								
Total - All accommodation types	**2,613**	**44,070**	**13.2**	**-0.6**	**105**	**0**	**4,324**	**116**
Total - Hotels	952	14,196	6.1	-2.2	24	-2	1,422	-8
Motels	858	9,653	12.8	-10.3	52	-1	1,232	-32
Vacation Rentals	150	8,657	-0.2	1.0	12	0	825	20
03 Central Kootenay								
Total - All accommodation types	**1,226**	**15,528**	**-4.0**	**3.2**	**68**	**2**	**1,430**	**-40**
Total - Hotels	759	8,212	1.3	0.1	15	1	676	7
Motels	319	4,381	-23.6	-7.4	28	-5	508	-106
Vacation Rentals	92	1,204	38.2	50.1	17	5	130	52
05 Kootenay Boundary								
Total - All accommodation types	**388**	**4,941**	**2.7**	**-8.5**	**31**	**2**	**643**	**26**
Motels	251	2,799	7.8	-13.6	22	1	370	13
Cariboo								
41 Cariboo								
Total - All accommodation types	**1,477**	**15,126**	**-0.7**	**-0.6**	**94**	**-1**	**2,036**	**12**
Motels	839	7,624	6.1	2.2	38	0	1,140	44
Vacation Rentals	62	1,227	-20.8	8.3	22	-4	177	-42
Miscellaneous	126	1,331	-29.3	-6.4	14	2	149	10
53 Fraser-Fort George								
Total - All accommodation types	**2,295**	**23,100**	**2.7**	**-6.1**	**52**	**-1**	**2,418**	**-101**
Total - Hotels	1,661	16,206	2.0	-5.4	18	-1	1,392	-100
Motels	589	5,979	4.4	-9.7	28	-1	967	-4
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	**513**	**10,906**	**3.0**	**1.1**	**29**	**1**	**953**	**37**
Motels	123	2,023	-0.6	-0.4	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	**697**	**6,725**	**7.3**	**0.2**	**33**	**-2**	**809**	**-10**
Motels	243	2,529	-8.0	-5.4	15	-1	387	-7
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	**954**	**7,929**	**-7.3**	**1.4**	**54**	**-4**	**1,197**	**-92**
Fishing lodges	123	538	-52.1	-23.6	12	-1	72	-8
Motels	510	4,476	6.6	8.8	24	-1	656	0
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	**3,470**	**39,537**	**8.9**	**19.2**	**66**	**-1**	**2,807**	**154**
Total - Hotels	1,485	16,257	12.7	9.5	18	-2	1,301	-45
Motels	1,173	10,049	39.9	25.1	33	1	999	98
Vacation Rentals	752	12,389	-25.5	25.8	11	0	416	101

Table 5: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue ($000)		Revenue % change from		Properties (#)	Properties # chg from	Rooms (#)	Rooms # chg from
	Oct-03	YTD 03	Oct-02	YTD 02	Oct-03	Oct-02	Oct-03	Oct-02
Vancouver Island/Coast	**19,868**	**248,344**	**5.8**	**1.2**	**409**	**2**	**15,469**	**301**
Victoria (C)	9,862	111,187	8.8	-5.9	77	-4	5,339	-52
Other CRD	2,138	29,548	-8.3	4.0	83	0	2,563	161
Nanaimo (C)	1,407	16,206	4.8	3.1	21	0	1,196	0
Port Alberni (C)	229	3,118	-4.4	0.0	11	-1	330	-37
Courtenay (C)	613	6,897	14.6	15.5	10	1	423	1
Rest of Development Region	5,620	81,388	10.5	10.2	217	7	5,618	228
Mainland/Southwest	**52,270**	**709,574**	**-5.8**	**-5.3**	**403**	**3**	**35,660**	**-4**
Downtown Vancouver (C)	29,996	329,128	-7.6	-6.0	84	-1	12,916	-165
Other Vancouver (C)	2,036	27,445	-0.7	-8.6	36	-1	2,815	5
Richmond (C)	6,684	77,749	-4.9	-3.0	23	1	4,321	70
Burnaby (C)	1,864	21,543	-8.4	-6.1	11	-17	1,215	-22
Other GVRD	4,884	56,886	1.1	-4.3	78	-2	4,549	-9
Whistler (DM)	3,051	155,762	-14.2	-6.4	65	2	6,438	88
Rest of Development Region	3,755	41,061	6.3	2.6	106	21	3,406	29
Thompson/Okanagan	**13,785**	**193,618**	**3.0**	**3.2**	**449**	**11**	**16,446**	**377**
Penticton (C)	1,496	20,472	14.5	5.3	43	2	1,833	130
Kamloops (C)	2,658	36,794	-5.2	10.4	63	-1	3,527	45
Kelowna (C)	4,508	52,325	9.8	0.2	48	6	2,715	123
Vernon (C)	1,021	15,916	9.1	12.0	29	4	1,354	173
Rest of Development Region	4,101	68,111	-3.0	-0.4	266	0	7,017	-94
Kootenay	**4,226**	**64,539**	**6.7**	**-0.4**	**204**	**4**	**6,397**	**102**
Cranbrook (C)	846	7,047	28.9	-6.5	17	0	794	0
Rest of Development Region	3,380	57,492	2.2	0.4	187	4	5,603	102
Cariboo	**3,772**	**38,226**	**1.3**	**-4.0**	**146**	**-2**	**4,454**	**-89**
Quesnel (C)	367	3,059	26.7	5.2	13	0	452	0
Williams Lake (C)	394	4,032	-6.0	-1.2	12	1	621	53
Prince George (C)	1,875	17,325	2.3	-5.3	27	-2	1,688	-104
Rest of Development Region	1,136	13,810	-3.9	-4.9	94	-1	1,693	-38
North Coast	**1,210**	**17,631**	**5.4**	**0.8**	**62**	**-1**	**1,762**	**27**
Prince Rupert (C)	405	6,199	6.6	-1.3	16	1	773	40
Terrace (C)	420	3,732	7.6	-4.1	12	0	386	-23
Rest of Development Region	385	7,701	2.0	5.1	34	-2	603	10
Nechako	**954**	**7,929**	**-7.3**	**1.4**	**54**	**-4**	**1,197**	**-92**
Smithers (T)	476	3,677	11.3	-3.5	17	0	427	-13
Rest of Development Region	479	4,251	-20.5	6.1	37	-4	770	330
Northeast	**3,470**	**39,537**	**8.9**	**19.2**	**66**	**-1**	**2,807**	**154**
Dawson Creek (C)	641	5,018	53.8	17.7	15	0	499	0
Fort St. John (C)	1,143	16,708	5.1	5.0	19	-1	1,005	-6
Rest of Development Region	1,686	17,811	0.2	36.9	32	0	1,303	160

Table 6: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
1997	205,480	665,314	146,520	44,803	43,225	17,800	9,301	25,142	1,157,585
1998	219,677	686,970	155,799	47,223	42,381	17,923	8,932	27,183	1,206,090
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
Quarterly data									
2001 Q2	69,196	213,644	44,680	13,231	11,162	5,361	2,084	7,253	366,610
2001 Q3	112,914	276,100	85,088	24,811	15,882	8,446	3,413	9,112	535,765
2001 Q4	39,967	144,660	28,422	10,909	8,097	2,791	1,875	8,312	245,033
2002 Q1	38,001	205,182	37,083	19,439	8,298	2,802	1,491	13,153	325,447
2002 Q2	72,537	212,157	46,451	14,875	11,478	5,076	2,034	7,697	372,306
2002 Q3	116,167	276,322	90,689	26,530	16,318	8,472	3,262	9,143	546,901
2002 Q4	41,750	156,673	31,188	10,869	8,420	2,666	2,056	7,911	261,533
2003 Q1	39,094	208,010	40,408	20,482	7,500	2,819	1,579	15,940	335,831
2003 Q2	71,691	189,501	49,631	14,624	11,457	5,056	2,104	8,849	352,913
2003 Q3	117,691	259,792	89,795	25,207	15,497	8,547	3,291	11,279	531,099
Monthly data									
Aug-02	45,865	105,008	37,405	10,938	5,967	3,024	1,105	3,035	212,347
Sep-02	30,699	75,418	20,960	7,203	5,157	2,353	1,103	3,384	146,278
Oct-02	18,599	55,507	13,381	3,962	3,723	1,147	1,030	3,187	100,536
Nov-02	11,910	41,802	7,472	2,484	2,635	865	586	2,499	70,252
Dec-02	11,241	59,364	10,335	4,423	2,063	654	441	2,225	90,745
Jan-03	9,564	62,257	12,122	5,439	2,250	732	442	4,011	96,816
Feb-03	12,874	72,408	13,523	7,301	2,260	966	534	5,073	114,938
Mar-03	16,656	73,344	14,763	7,743	2,990	1,120	603	6,857	124,076
Apr-03	18,409	55,669	11,893	4,344	3,192	1,006	510	3,497	98,520
May-03	24,458	64,094	16,335	4,655	3,780	1,441	666	2,455	117,885
Jun-03	28,824	69,739	21,402	5,625	4,485	2,608	928	2,897	136,509
Jul-03	39,336	86,041	32,818	8,639	5,169	3,103	1,058	3,757	179,922
Aug-03	46,971	101,199	36,958	9,963	5,569	3,108	1,142	3,984	208,895
Sep-03	31,383	72,552	20,018	6,605	4,759	2,335	1,091	3,538	142,282
Oct-03	19,868	52,270	13,785	4,226	3,772	1,210	954	3,470	99,554
Year-over-year percent changes									
Aug-02	2.6	0.9	9.2	13.7	6.8	2.3	-9.9	-4.0	3.3
Sep-02	7.4	4.5	3.4	3.1	4.6	4.5	7.7	13.5	5.1
Oct-02	5.5	16.1	15.7	1.3	8.5	-9.0	15.6	9.2	12.4
Nov-02	2.0	0.1	6.0	-6.1	3.8	-0.2	6.5	-6.2	0.7
Dec-02	5.5	7.7	5.4	1.6	-3.1	-1.4	1.4	-18.5	5.7
Jan-03	6.6	10.5	16.1	4.4	-11.1	1.6	7.1	-0.2	9.2
Feb-03	3.3	5.6	8.8	8.8	-18.1	-3.2	24.2	3.9	5.2
Mar-03	0.5	-8.6	3.9	3.0	-0.6	3.4	-6.8	61.2	-2.7
Apr-03	2.2	-11.6	9.2	2.2	5.8	6.8	3.6	5.3	-5.2
May-03	-1.1	-4.1	6.3	-3.2	-4.0	-6.1	9.4	28.8	-1.6
Jun-03	-3.2	-15.3	6.0	-3.3	-0.8	0.3	-0.6	17.3	-8.2
Jul-03	-0.7	-10.3	1.5	3.0	-0.5	0.3	0.4	37.9	-4.4
Aug-03	2.4	-3.6	-1.2	-8.9	-6.7	2.8	3.3	31.2	-1.6
Sep-03	2.2	-3.6	-4.5	-8.3	-7.7	-0.8	-1.1	4.6	-2.7
Oct-03	6.8	-5.8	3.0	6.7	1.3	5.4	-7.3	8.9	-1.0

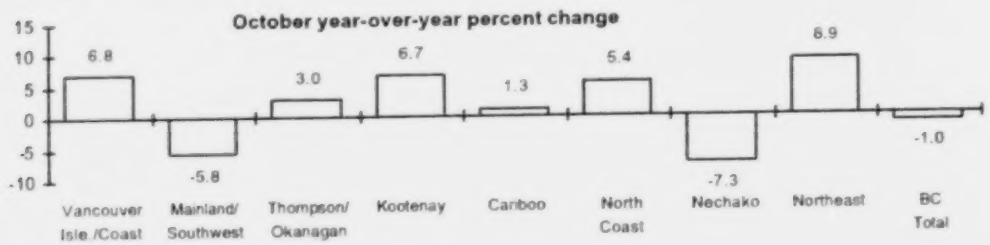


Table 7: Traveller Entries to Canada via BC, Unadjusted (000s)

Period	International								Canadian		
	Total	USA			Overseas				Total	USA same-day auto	Overseas
		Total	Same-day	Overnight	Total	Asia	Europe	Oceania*			
1997	7,322.8	5,892.6	2,798.2	3,094.4	1,430.2	798.0	449.1	122.1	13,427.5	9,328.6	767.3
1998	7,844.6	6,549.0	3,124.2	3,424.7	1,295.7	652.7	449.4	118.2	10,451.3	6,734.9	799.7
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0	9,588.1	5,813.1	798.7
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8	9,435.2	5,639.0	866.4
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9	8,328.6	4,720.3	902.8
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0	7,197.3	3,586.8	927.5
Quarterly data											
2002 Q2	2,113.8	1,746.0	766.6	979.4	367.8	206.2	111.7	31.5	1,857.0	961.0	226.5
2002 Q3	3,019.5	2,491.0	930.3	1,560.7	528.4	280.6	171.0	40.2	2,215.6	1,069.6	217.4
2002 Q4	1,462.4	1,211.8	582.3	629.6	250.6	149.3	63.4	24.4	1,576.4	827.8	208.1
2003 Q1	1,330.4	1,115.7	520.0	595.7	214.7	116.6	63.4	24.3	1,608.4	779.3	299.6
2003 Q2	1,843.4	1,561.8	698.1	863.7	281.6	110.0	114.1	35.8	1,730.4	921.6	177.8
2003 Q3	2,833.6	2,361.5	902.5	1,458.9	472.1	217.4	173.0	41.7	2,309.5	1,170.6	227.4
Monthly data											
Jul-02	1,110.0	915.8	325.4	590.5	194.2	104.8	60.2	13.3	759.5	373.6	64.8
Aug-02	1,163.6	980.0	340.3	639.8	183.5	96.4	61.1	13.2	831.0	392.1	88.4
Sep-02	745.9	595.2	264.7	330.5	150.7	79.4	49.7	13.7	625.0	303.9	64.1
Oct-02	503.3	406.6	194.7	212.0	96.7	63.6	22.8	6.2	560.5	290.9	63.4
Nov-02	438.9	373.6	196.5	177.1	65.3	40.2	16.4	5.7	506.8	270.2	67.6
Dec-02	520.2	431.6	191.1	240.5	88.6	45.4	24.2	12.4	509.0	266.7	77.1
Jan-03	437.5	364.6	182.1	182.5	72.9	39.1	17.9	11.8	535.2	255.8	110.4
Feb-03	444.1	377.0	166.9	210.1	67.1	35.0	22.1	6.9	483.5	246.3	83.3
Mar-03	448.8	374.1	171.0	203.1	74.6	42.5	23.3	5.6	589.7	277.2	105.9
Apr-03	448.3	378.5	183.4	195.1	69.9	31.9	25.0	6.1	516.7	267.6	67.6
May-03	611.3	521.4	239.8	281.6	89.9	31.1	38.7	14.4	602.1	318.3	57.1
Jun-03	783.8	661.9	274.9	387.0	121.9	47.0	50.4	15.2	611.6	335.7	53.1
Jul-03	1,024.8	861.4	313.1	548.3	163.4	71.0	61.4	13.2	772.3	398.5	64.2
Aug-03	1,118.8	947.5	339.6	607.9	171.2	81.7	62.8	13.7	903.9	446.4	95.2
Sep-03	690.0	552.5	249.9	302.7	137.5	64.8	48.9	14.9	633.3	325.7	68.1
Oct-03	454.2	371.7	179.8	191.9	82.5	52.0	21.9	5.5	560.6	302.6	71.2
Nov-03	393.2	333.5	173.4	160.1	59.7	36.4	14.4	5.3	548.0	293.3	78.4
Year-over-year percent changes											
Jul-02	-7.5	-7.3	-23.3	4.7	-8.5	-1.6	-18.8	-6.6	-22.3	-35.3	1.3
Aug-02	-5.2	-4.4	-19.7	6.4	-9.3	-2.4	-17.9	-3.1	-20.0	-34.3	1.3
Sep-02	5.8	6.4	2.6	9.6	3.7	17.8	-10.9	-7.4	7.6	2.8	0.7
Oct-02	23.4	22.6	25.5	20.0	26.8	48.7	-4.4	0.1	21.2	34.5	5.2
Nov-02	12.5	11.0	15.9	5.9	22.1	30.9	7.6	19.5	16.8	24.5	10.9
Dec-02	2.2	2.4	5.3	0.2	1.1	-3.1	-0.6	17.4	9.6	9.9	11.7
Jan-03	7.4	7.4	10.4	4.6	7.7	1.7	2.2	38.4	8.6	16.0	7.2
Feb-03	-3.4	-3.0	-4.2	-2.0	-5.9	-14.3	4.3	6.4	5.2	8.4	7.6
Mar-03	-11.7	-10.7	-9.9	-11.4	-16.2	-12.5	-13.4	-18.2	-1.1	-1.3	11.4
Apr-03	-10.9	-9.2	-8.9	-9.5	-19.1	-42.1	14.0	0.9	-13.7	-12.2	-21.8
May-03	-13.9	-10.3	-8.3	-12.0	-29.9	-56.1	0.9	16.7	-5.2	-0.7	-23.7
Jun-03	-13.0	-11.5	-9.5	-12.9	-20.4	-41.4	-2.1	16.7	-1.9	0.1	-18.6
Jul-03	-7.7	-5.9	-3.8	-7.1	-15.9	-32.3	1.9	-0.9	1.7	6.7	-1.0
Aug-03	-3.9	-3.3	-0.2	-5.0	-6.7	-15.2	2.8	3.4	8.8	13.9	7.6
Sep-03	-7.5	-7.2	-5.6	-8.4	-8.8	-18.4	-1.7	8.5	1.3	7.1	6.2
Oct-03	-9.7	-8.6	-7.7	-9.5	-14.6	-18.2	-3.8	-12.1	0.0	4.0	12.3
Nov-03	-10.4	-10.7	-11.8	-9.6	-8.7	-9.4	-12.0	-8.3	8.1	8.5	15.9

*** Australia, New Zealand, and other South Pacific nations**

SOURCE: Statistics Canada

Table 8: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International								Canadian		
	Total	USA			Overseas				Total	USA same-day auto	Overseas
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**			
1997	7,322.8	5,892.6	2,798.2	3,094.4	1,430.2	798.0	449.1	122.1	13,427.5	9,328.6	767.3
1998	7,844.6	6,549.0	3,124.2	3,424.7	1,295.7	652.7	449.4	118.2	10,451.3	6,734.9	799.7
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0	9,588.1	5,813.1	798.7
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8	9,435.2	5,639.0	866.4
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9	8,328.6	4,720.3	902.8
2002	7,960.1	6,583.2	2,808.1	3,787.8	1,376.9	764.0	411.8	118.0	7,187.8	3,582.5	924.9
Quarterly data											
2002 Q2	1,931.1	1,604.3	700.0	942.2	326.8	200.0	96.9	27.0	1,750.9	860.6	230.1
2002 Q3	1,991.5	1,652.6	691.8	940.7	338.9	189.6	95.8	30.1	1,821.1	882.8	231.0
2002 Q4	2,057.9	1,695.5	732.0	970.9	362.4	190.9	108.5	32.4	1,881.8	975.9	238.4
2003 Q1	1,878.4	1,565.2	667.9	900.8	313.1	162.9	104.4	30.6	1,788.2	914.9	234.5
2003 Q2	1,741.0	1,479.9	636.7	847.3	261.1	109.1	99.2	30.4	1,653.5	832.9	193.5
2003 Q3	1,843.8	1,551.0	667.4	876.4	292.9	148.5	97.5	31.2	1,857.8	946.7	236.0
Monthly data											
Jul-02	653.5	543.5	228.2	316.8	110.0	64.8	31.5	10.2	597.6	283.9	76.8
Aug-02	673.3	559.2	230.4	315.2	114.1	60.8	31.7	10.0	602.9	293.4	76.0
Sep-02	664.7	549.9	233.2	308.7	114.8	64.0	32.6	9.9	620.6	305.5	78.2
Oct-02	699.8	571.4	239.5	332.1	128.4	69.9	34.0	10.3	625.6	321.2	77.7
Nov-02	678.8	558.9	247.2	313.9	119.9	62.7	38.9	10.9	628.4	330.7	79.2
Dec-02	679.3	565.2	245.4	324.9	114.1	58.2	35.5	11.2	627.9	324.0	81.5
Jan-03	660.4	548.0	241.8	310.0	112.4	57.5	35.6	12.3	612.8	318.9	77.3
Feb-03	628.2	524.7	223.0	303.1	103.5	52.9	35.7	10.0	602.7	309.2	77.6
Mar-03	589.7	492.5	203.1	287.7	97.2	52.4	33.2	8.2	572.7	286.8	79.6
Apr-03	578.3	490.0	209.2	281.2	88.2	39.7	34.4	9.0	511.1	253.8	64.3
May-03	571.9	489.0	211.4	279.0	82.8	30.4	32.7	10.6	558.1	287.2	59.6
Jun-03	590.9	500.9	216.1	287.0	90.1	39.0	32.1	10.8	584.3	292.0	69.6
Jul-03	604.3	510.9	218.9	289.8	93.3	43.5	32.4	9.9	599.3	299.5	75.4
Aug-03	621.1	523.2	224.4	295.6	97.9	51.9	32.7	10.2	629.4	319.4	81.6
Sep-03	618.5	516.8	224.2	291.0	101.6	53.0	32.4	11.1	629.1	327.8	79.1
Oct-03	613.5	511.3	221.4	290.6	102.2	55.1	32.6	9.3	621.0	328.5	84.9
Nov-03	606.5	502.1	213.5	287.5	104.4	55.0	33.0	9.6	656.4	343.7	92.8
Month-over-month percent changes											
Jul-02	-0.4	-1.0	-2.3	-0.5	2.5	0.1	-3.5	12.3	1.6	-0.6	-1.8
Aug-02	3.0	2.9	0.9	-0.5	3.7	-6.2	0.9	-1.0	0.9	3.4	-1.1
Sep-02	-1.3	-1.7	1.2	-2.1	0.5	5.3	2.8	-1.3	2.9	4.1	2.8
Oct-02	5.3	3.9	2.7	7.6	11.9	9.3	4.4	4.3	0.8	5.1	-0.6
Nov-02	-3.0	-2.2	3.2	-5.5	-6.6	-10.3	14.4	5.4	0.4	2.9	1.9
Dec-02	0.1	1.1	-0.7	3.5	-4.8	-7.1	-8.8	2.5	-0.1	-2.0	3.0
Jan-03	-2.8	-3.0	-1.5	-4.6	-1.5	-1.2	0.2	10.2	-2.4	-1.6	-5.2
Feb-03	-4.9	-4.2	-7.8	-2.2	-8.0	-8.0	0.3	-18.4	-1.7	-3.0	0.3
Mar-03	-6.1	-6.1	-8.9	-5.1	-6.0	-0.9	-7.1	-18.5	-5.0	-7.2	2.6
Apr-03	-1.9	-0.5	3.0	-2.2	-9.3	-24.2	3.8	9.9	-10.8	-11.5	-19.2
May-03	-1.1	-0.2	1.1	-0.8	-6.1	-23.4	-5.0	17.4	9.2	13.2	-7.3
Jun-03	3.3	2.4	2.2	2.9	8.7	28.1	-1.7	2.3	4.7	1.7	16.9
Jul-03	2.3	2.0	1.3	1.0	3.7	11.7	0.7	-8.0	2.6	2.6	8.3
Aug-03	2.8	2.4	2.5	2.0	4.9	19.3	0.9	2.7	5.0	6.6	8.2
Sep-03	-0.4	-1.2	-0.1	-1.5	3.8	2.0	-0.7	8.4	0.0	2.6	-3.1
Oct-03	-0.8	-1.1	-1.2	-0.1	0.5	4.0	0.5	-16.2	-1.3	0.2	7.4
Nov-03	-1.1	-1.8	-3.6	-1.1	2.2	-0.2	1.3	3.5	5.7	4.6	9.2

*** Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total**

**** Australia, New Zealand, and other South Pacific nations**

SOURCE: BC STATS, Statistics Canada

Table 9: Transportation Indicators (Historical)

Period	Air Passenger Traffic (000s)								Other Transportation (000s)		
	Vancouver				Victoria	Kelowna	Prince George	Comox Valley	BC Ferries		Coquihalla Hwy
	Total	Domestic	Trans-border	Other Int'l.	Total	Total	Total	Total	Vehicles	Passengers	Passenger Vehicles
1998	15,508	8,215	4,123	3,170	1,214.2	799.7	322.8	66.0	7,822	21,418	2,365
1999	15,806	8,314	4,120	3,372	1,191.4	815.1	352.2	62.8	7,852	21,369	2,378
2000	16,033	8,306	4,074	3,652	1,139.2	835.9	392.9	72.6	7,887	21,280	2,389
2001	15,477	7,869	4,000	3,608	1,158.2	850.3	361.9	132.1	8,104	21,309	2,449
2002	14,878	7,422	3,855	3,600	1,102.2	836.9	325.4	148.7	8,245	21,540	2,518
Quarterly data											
2002 Q3	4,521	2,150	1,268	1,102	299.4	223.7	80.9	46.2	2,686	7,532	1,027
2002 Q4	3,319	1,747	780	793	263.9	207.8	89.1	34.7	1,833	4,627	480
2003 Q1	3,308	1,621	883	803	258.1	220.8	85.2	32.2	1,655	4,030	358
2003 Q2	3,285	1,723	909	652	289.1	193.9	82.6	38.1	2,113	5,388	679
2003 Q3	4,382	2,136	1,256	990	331.8	227.5	83.4	54.6	2,710	7,535	970
Monthly data											
Oct-02	1,198	641	263	293	95.7	69.7	29.6	12.3	667	1,670	203
Nov-02	963	507	227	229	77.9	60.2	28.2	9.3	547	1,385	126
Dec-02	1,158	599	289	270	90.3	77.9	31.3	13.2	619	1,572	151
Jan-03	1,119	537	292	289	78.8	72.8	27.1	10.2	522	1,253	103
Feb-03	1,030	513	277	240	84.1	69.8	27.5	10.1	519	1,244	113
Mar-03	1,159	570	314	274	95.2	78.3	30.6	11.9	614	1,533	142
Apr-03	970	522	244	203	94.3	63.1	27.0	12.3	646	1,608	191
May-03	1,083	584	299	200	98.9	65.9	29.3	12.5	714	1,827	232
Jun-03	1,232	618	366	249	95.9	64.9	26.3	13.3	753	1,953	257
Jul-03	1,483	715	453	314	109.8	78.6	27.2	19.1	930	2,618	356
Aug-03	1,641	784	482	375	121.8	84.0	29.2	20.4	1,032	3,032	388
Sep-03	1,258	636	321	301	100.2	64.9	27.0	15.2	748	1,885	226
Oct-03	1,152	636	248	267	110.5	70.4	29.9	14.3	672	1,657	209
Nov-03	985	524	233	229	88.6	66.0	27.3	11.2	570	1,358	112
Year-over-year percent changes											
Oct-02	12.5	7.1	16.9	21.7	0.0	5.7	2.9	N/A	4.1	5.0	7.8
Nov-02	4.7	-1.9	7.0	20.1	0.1	-1.4	6.0	N/A	-3.7	2.2	3.6
Dec-02	4.3	1.8	9.3	5.0	1.5	4.3	10.8	N/A	3.7	3.1	9.7
Jan-03	2.8	-0.1	4.3	7.0	2.9	8.3	6.2	2.2	5.0	5.2	5.8
Feb-03	-0.6	-1.0	2.0	-2.9	7.4	2.0	13.0	-1.6	4.2	4.0	7.8
Mar-03	-1.4	-2.4	4.6	-5.5	0.2	5.0	18.3	3.6	0.8	-1.6	-11.9
Apr-03	-13.6	-10.8	-8.1	-25.1	-0.8	-0.6	6.9	10.1	1.1	2.8	12.5
May-03	-13.2	-9.3	-2.7	-32.5	0.3	-1.0	6.8	-0.4	-2.5	-3.1	-0.4
Jun-03	-9.8	-5.7	-4.4	-24.4	0.6	-0.5	-2.3	8.2	0.3	-1.7	4.3
Jul-03	-4.5	-0.4	-2.8	-14.4	11.9	5.0	-0.7	19.4	1.0	-0.5	-1.4
Aug-03	-1.2	-0.7	2.7	-6.6	9.8	0.5	6.6	14.9	1.9	1.9	-6.5
Sep-03	-3.8	-0.9	-3.4	-9.8	10.8	-0.7	3.2	20.8	-0.5	-2.2	-9.7
Oct-03	-3.8	-0.8	-5.7	-8.9	15.5	1.1	0.9	16.2	0.7	-0.8	3.1
Nov-03	2.2	3.3	2.4	-0.2	13.7	9.6	-3.2	20.7	4.2	-1.9	-11.2

Table 10: Tourism sector indicators

Period	Employment (000s) [1]						Hotel Industry [2]		Consumer Price Index [1]	
	BC Total	Key industries in tourism sector								
	Industrial aggregate	Air transport	Heritage Institutions	Accom-modation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) [3]	Room Rate ($)	Traveller accom-modation	Restaurant food
1997	1,499.7	14.4	2.2	30.5	106.8	29.5	66.1	106.04	111.6	141.8
1998	1,511.2	15.9	2.3	29.4	109.6	27.3	61.9	108.59	113.9	152.6
1999	1,513.9	15.3	2.3	29.2	110.1	24.7	61.7	112.02	115.6	166.2
2000	1,574.3	14.8	2.3	28.2	116.7	26.5	60.0	114.04	117.6	171.3
2001	1,595.4	13.5	2.4	29.5	117.8	27.4	59.3	116.12	121.3	173.4
2002	1,612.7	12.2	2.5	29.2	118.1	28.8	59.0	117.66	125.4	186.8
Quarterly data										
2002 Q1	1,575.3	11.6	2.4	27.4	111.7	27.3	51.5	116.58	124.4	172.0
2002 Q2	1,617.4	12.0	2.5	29.6	120.3	28.9	62.4	117.68	124.9	184.6
2002 Q3	1,625.7	12.5	2.6	31.4	122.3	30.0	73.7	131.50	125.9	201.1
2002 Q4	1,632.6	12.6	2.6	28.2	117.9	28.9	48.3	104.87	126.3	189.3
2003 Q1	1,615.3	12.8	2.5	26.9	114.0	29.8	51.9	117.66	126.9	187.1
2003 Q2	1,657.7	13.1	2.8	29.4	118.8	32.5	59.4	113.68	126.9	192.4
2003 Q3	1,639.6	12.7	3.1	32.0	120.6	31.4	72.3	127.13	128.1	195.3
Monthly data										
Oct-02	1,643.1	12.3	2.6	29.5	121.3	29.4	56.4	102.85	126.1	193.9
Nov-02	1,632.8	12.5	2.6	27.9	116.6	28.4	45.9	94.30	126.2	187.6
Dec-02	1,621.9	13.0	2.6	27.3	115.9	29.1	42.5	117.45	126.7	186.5
Jan-03	1,606.2	12.5	2.5	27.8	114.4	29.5	44.2	117.82	126.9	184.4
Feb-03	1,614.7	12.7	2.5	26.5	113.1	29.3	54.7	121.26	127.0	185.4
Mar-03	1,625.1	13.2	2.4	26.4	114.4	30.5	56.9	113.91	126.9	191.6
Apr-03	1,638.4	13.0	2.8	27.7	117.0	32.2	55.6	104.95	126.8	193.0
May-03	1,657.1	13.1	2.7	29.5	119.8	32.5	60.0	113.92	126.9	192.8
Jun-03	1,677.5	13.1	3.1	30.9	119.7	32.9	62.6	122.17	127.1	191.5
Jul-03	1,636.4	12.9	3.2	32.0	122.4	31.9	71.1	130.51	127.8	198.2
Aug-03	1,637.9	12.6	3.2	33.2	122.0	31.9	79.5	131.13	128.3	197.6
Sep-03	1,644.4	12.7	2.9	30.9	117.5	30.4	66.2	119.75	128.2	190.1
Oct-03	1,654.6	12.5	2.9	29.2	118.2	28.9	56.8	100.28	128.3	189.7
Nov-03	1,639.3	12.4	2.8	27.6	116.1	28.1	48.0	91.15	128.6	180.1
Year-over-year percent changes										
Oct-02	1.6	-4.6	3.8	-3.1	2.0	4.2	5.2	2.5	2.6	7.2
Nov-02	2.4	5.9	7.9	-2.5	3.1	5.0	0.9	1.1	2.6	7.5
Dec-02	2.6	10.8	11.3	-1.8	2.6	7.7	0.9	5.7	2.8	4.1
Jan-03	2.4	9.0	4.3	0.7	2.1	9.7	1.4	5.3	2.3	7.8
Feb-03	2.7	8.9	3.0	-3.1	2.3	6.8	0.5	2.6	2.1	8.5
Mar-03	2.6	12.5	1.9	-3.9	1.9	10.5	-0.6	-4.8	1.8	10.1
Apr-03	2.5	7.5	18.0	-1.0	0.1	14.7	-2.9	-2.4	1.6	6.4
May-03	2.5	7.6	4.2	0.6	-1.5	12.5	-1.4	-1.5	1.8	3.2
Jun-03	2.4	10.1	20.8	-1.7	-2.3	10.8	-4.6	-6.0	1.5	3.1
Jul-03	1.2	2.5	22.5	0.1	-0.3	5.4	-2.9	-3.6	1.8	-1.3
Aug-03	1.2	0.4	21.3	2.4	-0.7	5.5	-0.5	-3.4	1.8	-3.5
Sep-03	0.1	1.8	10.1	3.3	-3.1	3.1	-1.0	-3.0	1.7	-3.8
Oct-03	0.7	1.1	10.6	-0.9	-2.6	-1.7	0.4	-2.5	1.7	-2.2
Nov-03	0.4	-0.5	10.9	-0.8	-0.4	-1.1	2.1	-3.3	1.9	-4.0

[1]Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours)

[2]Source: Pannell Kerr Forster

[3]Occupancy Rate change expressed as percentage point change

Table 11: BC Restaurant and Tavern Receipts

Period	Restaurants and Taverns [1]						
	BC	Receipts ($ million)					
	Total [2] locations	Total	Full service	Limited service	Food service contractors	Social & mobile caterers	Drinking places
1998	8,718	4,641.0	2,377.0	1,571.2	227.7	66.3	398.8
1999	8,606	4,467.5	2,188.8	1,616.5	214.3	78.2	369.8
2000	9,060	4,831.5	2,482.6	1,640.1	256.5	93.4	358.9
2001	8,706	5,176.3	2,762.5	1,690.1	274.1	91.6	357.9
2002	8,083	5,101.2	2,728.3	1,720.2	254.3	92.6	305.9
Quarterly data							
2002 Q1	8,277	1,213.5	647.8	390.7	73.3	22.0	79.7
2002 Q2	8,001	1,295.8	690.3	436.1	58.5	33.1	77.9
2002 Q3	7,975	1,350.7	740.2	451.2	61.4	18.8	79.1
2002 Q4	8,079	1,241.3	650.0	442.2	61.1	18.7	69.3
2003 Q1	8,278	1,225.7	660.6	411.5	71.8	14.3	67.6
2003 Q2	8,046	1,303.2	702.5	461.9	47.2	15.4	76.2
2003 Q3	8,168	1,486.4	820.7	504.5	57.9	27.0	76.2
Monthly data							
Oct-02	7,950	401.1	201.2	148.9	21.1	6.2	23.7
Nov-02	8,116	412.8	218.7	146.2	19.6	5.2	23.1
Dec-02	8,172	427.4	230.1	147.0	20.4	7.4	22.5
Jan-03	8,322	404.1	217.2	136.4	24.8	4.1	21.5
Feb-03	8,320	388.9	209.7	129.5	22.2	5.3	22.1
Mar-03	8,193	432.7	233.7	145.5	24.8	4.8	23.9
Apr-03	8,137	417.9	220.1	151.7	15.5	4.4	26.1
May-03	7,997	438.8	236.4	156.6	15.2	5.4	25.1
Jun-03	8,004	446.6	246.0	153.6	16.5	5.6	25.0
Jul-03	8,043	496.6	271.1	174.7	17.7	5.9	27.2
Aug-03	8,184	530.2	297.3	176.9	19.5	9.9	26.7
Sep-03	8,276	459.5	252.4	152.9	20.7	11.2	22.3
Oct-03	8,290	453.5	240.6	162.1	20.6	8.2	22.0
Nov-03	8,325	429.4	228.8	154.4	18.4	7.3	20.4
Year-over-year percent changes							
Oct-02	-8.7	-1.3	-4.2	9.1	-1.0	-27.4	-20.7
Nov-02	-5.6	5.1	7.1	8.1	1.0	-26.9	-13.9
Dec-02	-1.6	-0.9	-0.9	4.0	-2.3	-27.5	-15.2
Jan-03	1.1	5.2	6.6	8.4	6.1	-40.4	-11.5
Feb-03	0.0	-1.8	-0.6	2.2	-10.6	-33.2	-14.0
Mar-03	-1.0	-0.1	0.2	5.3	-1.3	-32.2	-19.1
Apr-03	0.7	0.3	-0.3	7.4	-21.5	-46.6	-0.6
May-03	0.2	0.6	2.8	5.0	-18.9	-55.5	-4.1
Jun-03	0.8	0.8	2.7	5.4	-17.2	-55.9	-1.9
Jul-03	1.3	8.1	7.4	13.5	-10.7	-0.1	0.1
Aug-03	2.1	11.3	11.6	12.5	-0.6	63.8	-2.2
Sep-03	3.8	10.7	13.9	9.1	-5.4	62.8	-9.3
Oct-03	4.3	13.1	19.6	8.8	-2.6	33.4	-7.2
Nov-03	2.6	4.0	4.6	5.6	-5.9	41.0	-11.4

[1]Source: Statistics Canada

[2]The number of locations (physical place in which business activity is conducted) operated in BC during the reporting month.

Note: with the change to NAICS (North American Industry Classification System) coding, many of the series are not available prior to January 1999.

Table 12: BC Restaurant and Tavern Receipts Seasonally Adjusted

Period	Restaurants and Taverns [1]					
	Receipts ($ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
1998	4,641.0	398.8	4,242.2	26,993.2	1,805.3	25,187.9
1999	4,467.5	369.8	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
Quarterly data						
2001 Q4	1,287	88	1,200	8,080	580	7,500
2002 Q1	1,282	84	1,197	8,134	560	7,574
2002 Q2	1,277	75	1,202	8,256	563	7,693
2002 Q3	1,246	74	1,172	8,359	557	7,803
2002 Q4	1,297	73	1,223	8,386	562	7,824
2003 Q1	1,290	72	1,218	8,306	532	7,774
2003 Q2	1,291	72	1,218	8,286	527	7,759
2003 Q3	1,372	71	1,301	8,447	524	7,923
Monthly data						
Oct-02	419	24	395	2,781	188	2,593
Nov-02	445	25	420	2,796	187	2,609
Dec-02	433	25	408	2,809	187	2,622
Jan-03	434	24	409	2,760	176	2,584
Feb-03	429	24	405	2,771	178	2,592
Mar-03	428	23	404	2,776	178	2,597
Apr-03	431	25	406	2,728	179	2,549
May-03	431	24	407	2,779	173	2,606
Jun-03	429	24	405	2,780	175	2,604
Jul-03	451	24	427	2,795	182	2,613
Aug-03	460	24	436	2,823	174	2,649
Sep-03	461	22	438	2,829	168	2,662
Oct-03	469	22	447	2,867	169	2,698
Nov-03	463	22	441	2,872	170	2,702
%Change						
Oct-02	1.6	-3.3	1.9	-0.5	-1.9	-0.4
Nov-02	6.1	3.8	6.2	0.5	-0.2	0.6
Dec-02	-2.8	-0.7	-2.9	0.5	0.1	0.5
Jan-03	0.3	-0.8	0.4	-1.8	-6.2	-1.4
Feb-03	-1.1	-0.1	-1.1	0.4	1.6	0.3
Mar-03	-0.4	-4.3	-0.1	0.2	-0.1	0.2
Apr-03	0.9	6.0	0.6	-1.7	0.3	-1.9
May-03	-0.1	-4.0	0.1	1.9	-3.2	2.2
Jun-03	-0.4	1.3	-0.5	0.0	1.3	-0.1
Jul-03	5.2	0.8	5.4	0.5	3.8	0.3
Aug-03	2.1	-1.5	2.3	1.0	-4.1	1.4
Sep-03	0.1	-5.8	0.4	0.2	-3.7	0.5
Oct-03	1.8	-2.4	2.0	1.3	0.6	1.4
Nov-03	-1.3	1.1	-1.4	0.2	0.8	0.1

[1]Source: Statistics Canada

Note: with the change to NAICS (North American Industry Classification System) coding, many of the series are not available prior to January 1999.

NUMBER

NUMÉRO

2

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March 2, 2004
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Tourism Sector Monitor ◆ February 2004

Highlights

Room Revenue

Room revenues in the province increased by 0.8% (seasonally adjusted) in November, posting a second consecutive monthly gain. Revenues were up in larger development regions, such as Mainland Southwest (+1.7%), Vancouver Island/Coast (+0.4%) and Thompson Okanagan (+0.5%). Revenues in the other development regions were mixed. Driving the growth was revenues at medium (76-150 rooms, +0.7%) and large (151-250 rooms, +1.2%) hotels, rather than at motels (-2.9%) or small hotels (1-75 rooms, -3.5%).

Room revenues post secondly monthly increase in November

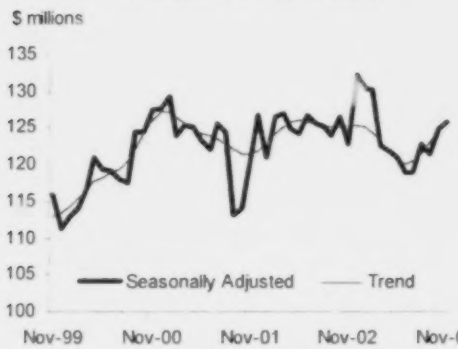


Table 1. Room Revenue* Summary

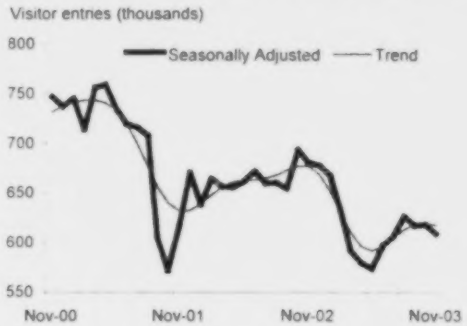
Accommodation Type	Nov 03 ($000)	Oct 03 ($000)	% change
Total	125,886	124,894	+0.8
Hotels	92,676	92,924	-0.3
Motels	15,588	16,062	-2.9
Other Acc.	17,733	17,473	+1.5
Regions (Top 3 performers)			
North Coast	1,644	1,614	+1.8
Mainland/Southwest	68,645	67,529	+1.7
Northeast	3,772	3,740	+0.9

**Seasonally adjusted room revenue*

Visitor Entries

The volume of travellers entering Canada via BC borders continued to decline in November, dropping 1.2% (seasonally adjusted). Entries from both the US (-1.3%) and overseas (-0.3%) were down, while Asian visitor entries crept up 0.2%, posting a sixth consecutive monthly gain.

Visitor entries down in November



Other Indicators

Average hotel occupancy was up (+2.4 percentage points) in November, while hotel room rates continued to drop (-1.9%) for the ninth consecutive month in 2003 (relative to November 2002).

Passenger vehicle traffic over the Coquihalla highway slumped (-11.2%) in November, compared to the same month of 2002. BC restaurant and tavern receipts fared well in November (+1.6%, seasonally adjusted), as both food services and drinking places saw more receipts than in October 2003.

Note to readers...

Special Focus Article: *BC's tourism sector limps through 2002*. Page 7.

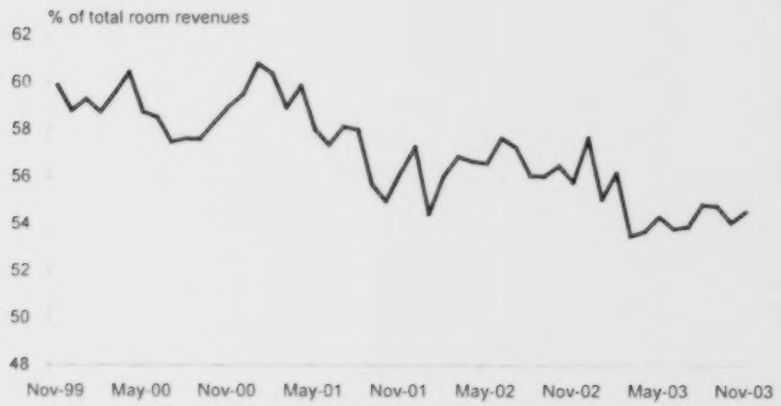
Tourism Trends

Room Revenue

Room revenues rose modestly (+0.8%, seasonally adjusted) in November. In the larger tourism regions, Vancouver Island/Coast (+0.4%), Mainland/Southwest (+1.7%) and Thompson Okanagan (+0.5%), revenues edged up for the second month in a row. Three regions—Nechako (-5.4%), Kootenay (-3.9%), and Cariboo (-2.8%)—showed significant month-over-month declines in room revenues.

The Mainland/Southwest region showed the strongest revenue growth in the province.

Despite strong growth in November, Mainland/Southwest holds a declining share of room revenues in BC



By establishment type, the increase in revenues was concentrated among mid-sized hotels (76 - 250 rooms), which had 0.9% higher revenues. Vacation rentals also recorded stronger revenues (+4.0%). In contrast, revenues at small hotels (1 - 75 rooms) fell 3.5%, while motels saw their revenues slip 2.9%.

Visitor Entries

The volume of visitors entering Canada through BC continued to fall in November, down 1.2% (seasonally adjusted). The largest decline was in US same-day traffic (-3.6%), though overnight visits from the US were also lower (-1.5). Visitor entries from Asia were virtually unchanged in November (+0.2%), though the past six months have seen strong growth.

The effect of the SARS panic on the Asian market was tremendous—larger in magnitude than 9/11 or even the Asian economic meltdown of 1997.

Asian travellers first began to really "discover" BC in 1994. The volume of travellers from Asian countries more than doubled over the next few years, and despite global economic and political turbulence, BC remained a choice destination.

Visitor entries from Asia were higher in November than in February (the month before the SARS scare).

The World Health Organization first issued SARS travel warnings in mid-March, 2003. By May, Asian visitor entries were at their lowest point since May 1991.

The recovery in the Asian market is no less impressive than its collapse. Since May, entries from Asia have risen 109.4%. Entries in November were actually 9.7% higher than in February—the month before the SARS panic.

Visitor Entries from Asia recover after SARS panic

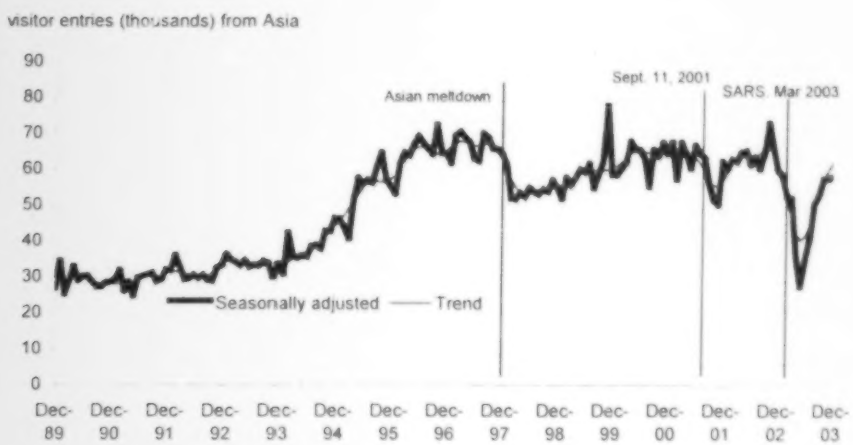


Table 2. Traveller Entries (*seasonally adjusted*)

	Nov-03 ('000)	Oct-03 ('000)	% chg from Oct-03
American visitors			
Total	504	511	-1.3
Same-day	216	224	-3.6
Overnight	288	292	-1.5
Overseas visitors			
Total	105	105	-0.3
Europe	34	34	1.5
UK	17	17	3.1
Asia	57	57	0.2
Japan	20	17	20.3
Taiwan	7	8	-11.1
Oceania	10	10	4.7
Canadian re-entries			
Total	658	630	4.5
From overseas	91	87	5.5
From US same-day auto	345	333	3.8

(BC STATS & Statistics Canada)

note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it also includes other areas

Other Tourism Indicators

Hotel occupancy was 48.0% in November, a full 2.4 percentage points above November of the previous year. Average room rates – $91.15 – were 1.9% lower than in the same month last year. This was the 9th straight month of falling room prices.

Hotel room prices continued to fall in November.

The Canadian dollar appreciated relative to US currency in November. One US dollar cost $1.31 Cdn, compared to $1.57 Cdn in November 2002 (down 26 cents). This would be expected to deter Americans from travelling to Canada.

Restaurant and tavern receipts in BC edged upward 1.6% (seasonally adjusted).

Table 3. Other Tourism Indicators (unadjusted)

	Reference period	Total	Change from year ago
Hotel Industry			
Occupancy rate	Nov-03	48%	2.4 pp
Average room charge	Nov-03	$91.15	-1.9%
(Pannell Kerr Forster)			
Airport Passengers		(000s)	(%)
Vancouver International Airport			
Total traffic	Nov-03	985	2.2
US	Nov-03	233	2.4
Other International	Nov-03	229	-0.2
Canada	Nov-03	524	3.3
(YVR)			
Victoria International Airport			
Total traffic	Nov-03	89	13.7
(Victoria Airport Authority)			
Restaurant Receipts		($ millions)	(%)
Full service	Nov-03	230	5.0
Limited service	Nov-03	172	17.3
Drinking places	Nov-03	21	-10.7
(Statistics Canada)			
Transportation		(000s)	(%)
Coquihalla Highway			
Passenger Vehicles	Nov-03	112	-11.2
(Ministry of Transportation & Highways)			
BC Ferries			
Vehicle Volume	Nov-03	570	-0.7
Passenger Volume	Nov-03	1,358	-1.9
(BC Ferries)			
Exchange Rates		Cdn $	Change from year ago
US $	Nov-03	1.313	-0.259
UK Pound	Nov-03	2.220	-0.248
Japanese Yen	Nov-03	0.012	-0.001
Australian $	Nov-03	0.940	0.058
(Statistics Canada)			

note: pp. percentage points

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues were up in December (+3.2%, seasonally adjusted), posting the highest growth in fourteen months. Mainland/Southwest and Vancouver Island/Coast had modest growth, while other regions showed stronger increases in room revenues.

Preliminary numbers for December point to a 3.2% (seasonally adjusted) growth.

A caution about preliminary numbers

Because companies file their hotel room taxes with a varying lag, the initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a two-month lag. However, we also briefly report "preliminary data" with a one-month lag.

How accurate is the preliminary data? Over the last eight reports room revenues changed (rose or fell on a month-over-month basis) on average by 3.2% (absolute value). Our preliminary numbers – reported in the "look ahead" box – were off by an average of 0.4 percentage points. The preliminary figures, in other words, seem basically on the mark, though they should be used with caution (a more detailed analysis of their accuracy will be undertaken in the future).

Visitor Entries

The number of visitors entering Canada via BC increased (0.6%, seasonally adjusted) after three months of declining entries. Travellers from both the US and overseas increased their numbers.

Visitor entries had the first solid performance in December, after three consecutive monthly losses.

Other Tourism Indicators

Hotel occupancy continued to increase by 1.8 percentage points to 44% in December (compared to the same month of 2002). Yet the average room charges fell 1.4%, posting a tenth consecutive monthly drop.

Hotel room rates fell 1.4% – the tenth consecutive drop.

The number of vehicles and passengers aboard BC Ferries slumped more than 12% in December – compared to the same month in 2002 – as a result of labour-management conflict. Passenger vehicle traffic over the Coquihalla highway was 8.8% less than the same month of the previous year.

The Canadian dollar was strong relative to US currency in December. One US dollar cost $1.31 Cdn, compared to $1.56 Cdn in December 2002 (down 25 cents).

Restaurant and tavern receipts in BC slipped 0.2% (seasonally adjusted) in December, due to lower receipts in food services.

Special focus: BC's tourism sector limps through 2002

Gross Domestic Product (GDP) in BC's tourism sector amounted to roughly five billion dollars in 2002, making up over four percent of the provincial economy. There were some 18,000 companies related to tourism in BC, and over 115,000 workers in the sector. Growth, however, was minimal in the tourism sector, and its size as a share of the BC economy is slowly declining.

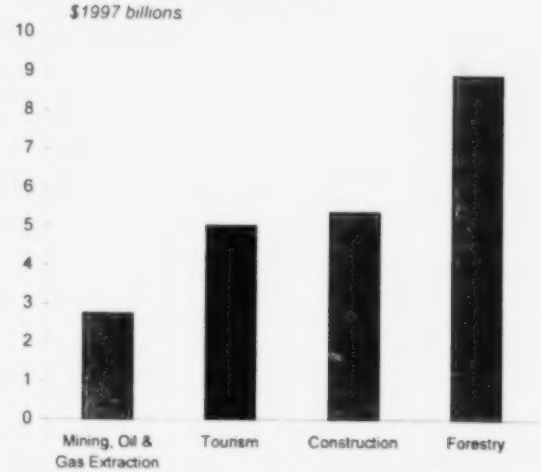
This report examines the latest GDP figures for BC's tourism economy, and also takes the opportunity to review the performance of the tourism sector over the past two decades, highlighting its strengths and weaknesses.

An important player in BC's economy

Tourism plays an important role in British Columbia's economy. The sector contributed $5.0 billion (constant 1997 dollars) to the British Columbia economy—4.2% of the province's gross domestic product (GDP). By comparison, tourism's contribution is significantly larger than mining and oil & gas extraction ($2.7 billion), and similar in size to the construction industry ($5.3 billion). It is a bit more than half the size of the forestry sector ($8.9 billion).[1]

Hotels, motels, restaurants and related establishments produce 38.1% of the tourism sector's GDP. Airlines and other transportation (27.5%) industries and retailers (12.9%) are also key players. Other industries make up the remaining 21.4% of total tourism GDP.

Tourism generates about 4% of BC's GDP



A note on GDP

GDP is a measure of the value added to the economy by a particular activity. It is calculated by subtracting the cost of supplies used to produce a good or service from total sales. For example, the price of a restaurant meal covers the cost of food purchased to make the meal, the energy used to cook it, rent and other building expenses, cleaning supplies, accountants fees, and so on. It also includes a markup intended to cover items such as wages, profits and depreciation. The restaurant didn't produce the food or energy it used. Its contribution to GDP is only the value of the service it provided–the difference between the price paid by the consumer and the inputs (such as food and energy) used by the restaurant.

The GDP figures reported in this article are in constant (1997) dollars. This means that they have been adjusted to eliminate the effects of price changes over time.

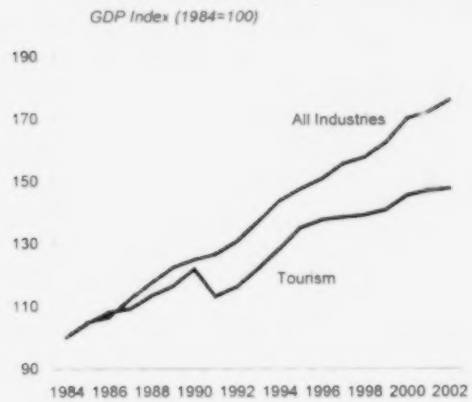
[1] This includes not only logging but related industries such as pulp and paper manufacturing

The tourism sector has not fared well in recent years

The tourism sector was sluggish in 2002, expanding by a meagre 0.4%. This is well below provincial GDP growth of 2.2%.

Below-average growth is a long-term pattern in BC tourism. In only five of the last 17 years did the tourism sector outpace the provincial economy. Since 1984, tourism GDP has increased 47%, compared with 76% growth in all industries combined. Its share of provincial GDP has fallen from 5.1% in 1984 to 4.2% in 2002.

GDP in the tourism sector has lagged behind the rest of the economy



Since 1984, the retail component of tourism has shown the strongest performance, increasing 70% over the period. Accommodation and food service, the largest element of the tourism economy, has closely matched the performance of total tourism GDP (+45%).

The dismal performance of the transportation sub-sector has been a long-term problem for tourism in BC. Over the last 17 years, tourism-related transportation grew by a total of 8%. The 1991 recession battered the transportation sub-sector, and its GDP plummeted 24% in that year. It took 8 years for the sector to recover, and it is once again in trouble. In 2001, tourism-related transportation GDP fell 3% and showed no growth in 2002.

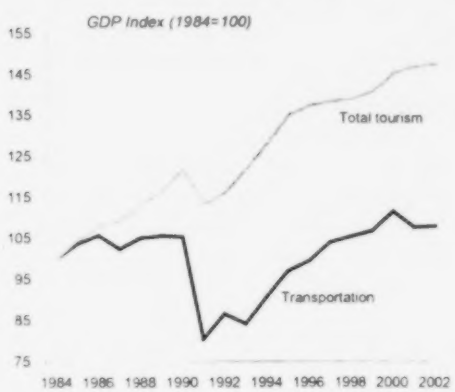
Canada's turbulent airline industry is the main source of the problems. A privatization and deregulation program began some 15 years ago, in a bid to make the industry more competitive. Many airlines have yet to effectively adapt to the new environment.

Canadian Airlines, on the verge of collapse, was absorbed by Air Canada in 2000. In the next year, Canada 3000—having become the nation's second-largest carrier—declared bankruptcy and its 5,000-strong workforce was dismissed.

Despite the dissolution of its main competitors, Air Canada itself filed for bankruptcy protection in early 2003. The airline continues to operate under a court-monitored restructuring program.

In BC, the air transportation industry shed almost 3,700 workers between 1998 and 2002—23% of its workforce.

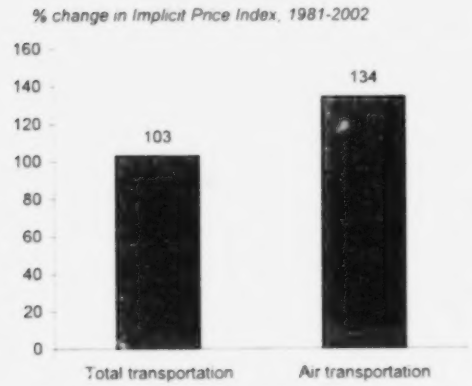
Weakness in the transportation component of the tourism sector has hampered growth



The cost of air transportation, furthermore, has increased sharply over the last two decades. General transportation costs (car

prices, gas, etc.) essentially doubled (+103%) between 1981 and 2002. However, prices for air transportation increased 134% over the same period.

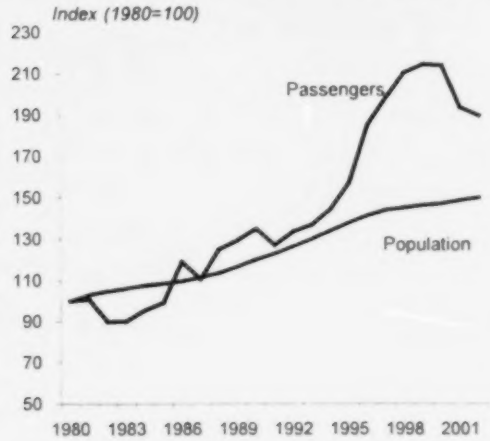
Higher inflation in air transportation



Thus, the long-term health of BC's tourism-related transportation sector hinges on a two-fold problem: maintaining a solvent airline industry while at the same time keeping air travel prices reasonable.

In spite of the troubles in the airline industry, passenger volumes have grown considerably since 1980 (+90%), well ahead of the rise in BC's population (+50%). Much of this growth occurred in the late 1990s in the wake of the open skies agreement, which opened up more direct routes between Canada and the US.

Vancouver airport passenger volumes showed strong growth in the late 1990s



Traveller Volumes to BC

In 2002, the number of international visitors entering Canada through BC border points was down 4.1%. Same-day trips from the US into BC dropped 13.8%, though overnight trips actually increased (+4.2%). The number of overseas visitors edged down 3.0%.

BC has seen strong growth in visitor entries over the past two decades. Between 1980 and 2002, the number of visitors doubled. From the US, same-day visits rose 52%, while overnight trips jumped 114%. Entries from the US make up the vast majority (84%) of all travel to BC. However, the proportion of visitors from overseas has been growing. Visitor entries from Europe have grown 126% since 1980, while entries from Asia have exploded (+552%).

Visitor entries to BC from Asia have soared since the mid-1980s

It is important to remember, however, that visitor entries are only a rough indicator of tourist activity in the province. Some people who enter Canada via BC may be headed for other destinations. The province's location as a transit point for travellers from Asia means that many overseas visitors going to other parts of the country, or even south of the border, initially clear customs in Vancouver.

18,000 businesses offer tourism-related services

There were 17,996 businesses in the tourism sector in 2002. The majority of these firms (61%) were small businesses with fewer than 10 employees. Most (53%) were in the food and beverage industry. The number of firms in the tourism sector has been fairly stable in recent years, increasing 2.6% since 1998.

115,500 British Columbians work in the tourism sector

Employment in the tourism sector was virtually unchanged in 2002 (+0.4%). The sector employs 115,500 people, representing 7.2% of BC workers. The share of BC jobs in tourism since 1991 has been virtually constant.

Tourism employment includes workers in a variety of businesses, ranging from restaurants and hotels to travel agents and airline staff. Exactly half of the jobs are in the accommodation and food industry. Transportation (17%) and retailing (17%) are the other big employers in this sector. All of the tourism jobs are in the service industries.

Over the past decade, the accommodation and food industry has been responsible for most of the new tourism jobs, up 32% since 1991. Employment in retail sales grew 16%, over the same period. The number of jobs in transportation rose 4% since 1991, despite significant decline over the last few years.

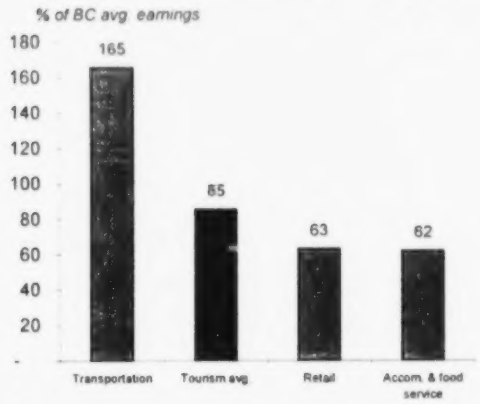
Are tourism employment estimates comparable to other employment figures?

Yes, as long as care is taken to ensure that jobs are not double counted. Since the tourism employment figures are calculated by apportioning a share of total employment in each industry to the tourism sector, those jobs must be subtracted from total employment in the relevant industries.

Tourism workers earned an average of $577 per week in 2002, noticeably below the total BC average ($675). Workers in transportation had very high weekly earnings ($1116), while those employed in retail ($426) and accommodation and food service ($418) had weekly earnings well below the BC average. This is partly due to the tendency for tourism jobs to be part-time, often held by young people and students. [2]

[2] For more detail on tourism-related jobs, see the article "The Tourism Labour Market," published in issue 03-07 of the *Tourism Sector Monitor*. Note that in this report, we have revised the methodology for calculating average earnings in tourism.

Most tourism jobs offer below-average weekly earnings



Average weekly earnings in the tourism sector inched up 1.1% in 2002. Since 1991, earnings have risen 17%.

Tourism GDP in 2003?

Tourism sector GDP figures for 2003 will not be available for some time. However, there are a variety of indicators that provide an idea of what to expect from the next annual GDP release.

A review of the available data for 2003 points to a challenging year for tourism. Visitor entries to Canada via BC border crossings were down 8% in 2003. Entries from both the US (-7%) and overseas (-13%) dropped significantly. Most worrisome was the massive decline in visitor entries from Asia (-24%), which fell to their lowest level in years.

However, as noted earlier, there has been an impressive recovery in the Asian market over the later half of 2003. Indeed, by November, visitor entries from Asia were 9.7% higher than in February 2003 (*seasonally adjusted*), the month before the SARS outbreak.

Thus, the steep drop in visitor entries suggests that 2003 was a difficult year, but there does not seem to have been any longer-term damage as a result of the SARS scare.

Other tourism indicators tell a similar story. Passenger volumes at Vancouver airport were down 3.7% in 2003, and the number of overseas travellers was down %10.0.

Hotel occupancy rates (58.3%) hit their lowest level in at least a decade. Hotel room rates dipped 1.7%, and the overall consumer price index for traveller accommodation sunk 9.9%, nearly wiping out 8 years of inflation.

Preliminary room revenue data indicates that room revenues in BC edged down 1.4% in 2003, the first decline since 1991.

There was some positive economic news last year. Employment in some key tourism-related industries expanded slightly in 2003. Most notable, employment in air transportation—riding gains made in the first half of the year—was up 4.4%. As well, restaurant and tavern revenues rose a solid 5.7%.

Nevertheless, the overall indication is that 2003 was a particularly difficult year for the tourism sector in BC. A major factor in this was the SARS panic—which should not carry any effects into 2004. At this time, ongoing trouble in the transportation sector seems to be the main weak point for tourism in the province.

Tourism GDP and Employment

2002 data ($1997 million)	Tourism-related activities	Other activities	Tourism as % of industry GDP	% of tourism GDP
Tourism sector GDP	***5,012***			
Accommodation & food services	1,911	1,767	52.0	38.1
Retail	645	6,980	8.5	12.9
Transportation & warehousing	1,380	5,859	21.9	27.5
Other with tourism component	1,075	68,888	1.5	21.4
Goods industries		28,687		
Service industries	5,012	84,540	5.9	100
Total GDP for BC: 118,240			***4.2***	100

2002 data	Tourism-related activities	Other activities	Tourism as % of industry employment	% of tourism employment
Tourism sector employment ('000)	***115.5***			
Accommodation & food services	58.2	89.1	39.5	50.4
Retail	19.3	190.1	9.2	16.7
Transportation & warehousing	20.0	82.9	19.4	17.3
Other with tourism component	18.0	749.5	2.3	15.6
Goods industries		291.9		
Service industries	115.5	1,196.5	9.7	100
Total employment in BC: 1,612,737			***7.2***	100

2003 Year-to-Date (Jan - Nov)	Tourism-related
Tourism sector employment ('000)	***117.5***
Accommodation & food services	58.0
Retail	20.2
Transportation & warehousing	20.5
Other with tourism component	18.8

	1998	1999	2000	2001	2002
GDP at basic prices ($million)					
Tourism	***4,864***	***5,067***	***5,235***	***5,398***	***5,485***
Accommodation & food services	1,889	1,915	1,984	2,088	2,086
Retail	550	561	598	631	664
Transportation & warehousing	1,432	1,528	1,548	1,548	1,582
Other	994	1,063	1,106	1,132	1,154
GDP at basic prices ($1997 million)					
Tourism sector	***4,724***	***4,784***	***4,940***	***4,992***	***5,012***
Accommodation & food services	1,847	1,831	1,877	1,912	1,911
Retail	549	555	582	614	645
Transportation & warehousing	1,348	1,366	1,426	1,378	1,380
Other	979	1,030	1,055	1,090	1,075
Employment ('000)					
Tourism sector	***112.5***	***111.3***	***112.8***	***115.0***	***115.5***
Accommodation & food services	56.2	56.2	57.0	58.4	58.2
Retail	16.4	16.2	17.0	18.3	19.3
Transportation & warehousing	21.4	21.4	21.4	20.6	20.0
Other	18.5	17.5	17.3	17.7	18.0

Tourism GDP and Employment

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Retail	550	561	598	631	664
Transportation & warehousing	1,432	1,528	1,548	1,548	1,582
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Other	979	1,030	1,055	1,090	1,075
Employment ('000)					
Tourism sector	*112.5*	*111.3*	*112.8*	*115.0*	*115.5*
Accommodation & food services	56.2	56.2	57.0	58.4	58.2
Retail	16.4	16.2	17.0	18.3	19.3
Transportation & warehousing	21.4	21.4	21.4	20.6	20.0
Other	18.5	17.5	17.3	17.7	18.0

Table 1: Seasonally Adjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
1998	219,677	686,970	155,800	47,223	42,381	17,923	8,932	27,183	1,206,090
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
Quarterly data									
2002 Q3	66,011	211,318	51,809	17,955	11,100	4,840	2,158	9,245	374,437
2002 Q4	67,817	216,132	52,538	17,625	11,007	4,625	2,353	9,412	381,510
2003 Q1	68,910	210,491	55,768	18,963	10,398	4,856	2,354	11,487	383,225
2003 Q2	67,057	194,922	52,865	17,710	10,773	4,742	2,200	11,205	361,475
2003 Q3	67,182	197,939	51,731	17,279	10,530	4,852	2,194	11,495	363,201
Monthly data									
Jun-02	22,464	73,069	16,401	5,982	3,654	1,559	732	2,944	126,806
Jul-02	22,054	71,817	17,265	5,735	3,529	1,592	709	2,770	125,472
Aug-02	22,302	70,074	17,371	6,198	3,799	1,616	701	2,969	125,031
Sep-02	21,655	69,427	17,172	6,022	3,772	1,632	748	3,506	123,934
Oct-02	22,212	71,458	17,568	5,708	3,743	1,525	840	3,477	126,530
Nov-02	22,051	68,486	17,320	5,818	3,699	1,559	772	3,125	122,830
Dec-02	23,554	76,189	17,650	6,099	3,566	1,541	741	2,810	132,150
Jan-03	22,848	71,798	20,177	6,259	3,506	1,619	745	3,467	130,418
Feb-03	23,300	73,071	17,965	6,487	3,276	1,571	863	3,607	130,140
Mar-03	22,762	65,622	17,625	6,217	3,616	1,666	745	4,412	122,667
Apr-03	22,821	65,368	17,662	6,051	3,583	1,632	732	3,918	121,767
May-03	22,274	65,618	17,562	5,823	3,564	1,538	749	3,735	120,863
Jun-03	21,963	63,937	17,642	5,835	3,625	1,572	719	3,553	118,845
Jul-03	22,028	64,111	17,196	5,920	3,521	1,591	729	3,887	118,983
Aug-03	22,607	67,305	17,311	5,697	3,535	1,644	731	3,927	122,758
Sep-03	22,547	66,523	17,224	5,662	3,474	1,617	733	3,681	121,461
Oct-03	23,499	67,529	17,879	6,090	3,782	1,614	761	3,740	124,894
Nov-03	23,597	68,645	17,978	5,854	3,676	1,644	720	3,772	125,886
Month-over-month growth rates									
Jun-02	-0.8	4.0	-1.0	1.9	-1.5	-4.1	9.7	2.8	2.1
Jul-02	-1.8	-1.7	5.3	-4.1	-3.4	2.2	-3.1	-5.9	-1.1
Aug-02	1.1	-2.4	0.6	8.1	7.7	1.5	-1.2	7.2	-0.4
Sep-02	-2.9	-0.9	-1.1	-2.8	-0.7	1.0	6.8	18.1	-0.9
Oct-02	2.6	2.9	2.3	-5.2	-0.8	-6.6	12.2	-0.8	2.1
Nov-02	-0.7	-4.2	-1.4	1.9	-1.2	2.3	-8.0	-10.1	-2.9
Dec-02	6.8	11.2	1.9	4.8	-3.6	-1.2	-4.1	-10.1	7.6
Jan-03	-3.0	-5.8	14.3	2.6	-1.7	5.0	0.6	23.4	-1.3
Feb-03	2.0	1.8	-11.0	3.6	-6.6	-3.0	15.9	4.1	-0.2
Mar-03	-2.3	-10.2	-1.9	-4.2	10.4	6.1	-13.7	22.3	-5.7
Apr-03	0.3	-0.4	0.2	-2.7	-0.9	-2.1	-1.7	-11.2	-0.7
May-03	-2.4	0.4	-0.6	-3.8	-0.5	-5.7	2.3	-4.7	-0.7
Jun-03	-1.4	-2.6	0.5	0.2	1.7	2.2	-4.0	-4.9	-1.7
Jul-03	0.3	0.3	-2.5	1.4	-2.9	1.2	1.4	9.4	0.1
Aug-03	2.6	5.0	0.7	-3.8	0.4	3.3	0.3	1.0	3.2
Sep-03	-0.3	-1.2	-0.5	-0.6	-1.7	-1.7	0.3	-6.3	-1.1
Oct-03	4.2	1.5	3.8	7.6	8.9	-0.1	3.7	1.6	2.8
Nov-03	0.4	1.7	0.5	-3.9	-2.8	1.8	-5.4	0.9	0.8

November month-over-month percent growth

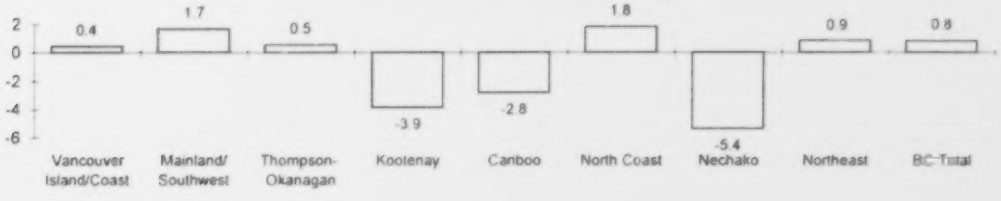


Table 2: Seasonally Adjusted Room Revenue by Accommodation Type ($000)

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			
1998	366,256	158,023	237,901	163,131	166,418	62,152	52,208
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
Quarterly data							
2002 Q3	117,200	46,601	74,418	44,098	45,697	27,811	21,314
2002 Q4	116,984	46,798	74,256	43,929	44,859	28,983	22,835
2003 Q1	115,273	46,263	74,693	44,353	45,833	29,763	24,826
2003 Q2	106,393	43,645	72,844	43,429	45,310	29,322	22,619
2003 Q3	108,103	44,356	73,723	43,127	44,424	28,681	23,153
Monthly data							
Jun-02	40,507	16,048	24,710	14,896	15,131	8,981	7,257
Jul-02	39,599	15,764	24,775	14,779	15,234	8,871	6,957
Aug-02	38,727	15,862	24,757	14,949	15,465	9,267	7,367
Sep-02	38,874	14,976	24,886	14,370	14,999	9,672	6,990
Oct-02	40,118	15,360	24,708	14,724	15,234	10,269	7,412
Nov-02	36,646	15,098	24,523	14,992	14,660	9,109	7,522
Dec-02	40,220	16,340	25,026	14,213	14,964	9,605	7,902
Jan-03	40,406	15,765	25,469	15,096	15,171	9,932	8,057
Feb-03	39,054	15,659	24,988	14,933	15,418	9,948	8,547
Mar-03	35,813	14,839	24,236	14,324	15,244	9,883	8,222
Apr-03	35,725	14,919	24,492	14,482	15,219	9,701	7,280
May-03	36,027	14,559	24,114	14,680	14,932	9,957	7,661
Jun-03	34,641	14,167	24,238	14,267	15,159	9,664	7,679
Jul-03	34,705	14,390	24,214	14,277	14,885	9,708	7,625
Aug-03	37,200	15,004	24,800	14,657	14,981	9,691	7,629
Sep-03	36,198	14,962	24,710	14,194	14,558	9,283	7,899
Oct-03	36,901	15,519	25,549	14,955	16,062	9,554	7,919
Nov-03	36,796	15,713	25,738	14,429	15,588	9,940	7,793
Month-over-month growth rates							
Jun-02	4.6	0.8	-0.4	2.4	0.6	2.2	6.9
Jul-02	-2.2	-1.8	0.3	-0.8	0.7	-1.2	-4.1
Aug-02	-2.2	0.6	-0.1	1.2	1.5	4.5	5.9
Sep-02	0.4	-5.6	0.5	-3.9	-3.0	4.4	-5.1
Oct-02	3.2	2.6	-0.7	2.5	1.6	6.2	6.0
Nov-02	-8.7	-1.7	-0.7	1.8	-3.8	-11.3	1.5
Dec-02	9.8	8.2	2.1	-5.2	2.1	5.4	5.1
Jan-03	0.5	-3.5	1.8	6.2	1.4	3.4	2.0
Feb-03	-3.3	-0.7	-1.9	-1.1	1.6	0.2	6.1
Mar-03	-8.3	-5.2	-3.0	-4.1	-1.1	-0.6	-3.8
Apr-03	-0.2	0.5	1.1	1.1	-0.2	-1.8	-11.5
May-03	0.8	-2.4	-1.5	1.4	-1.9	2.6	5.2
Jun-03	-3.8	-2.7	0.5	-2.8	1.5	-2.9	0.2
Jul-03	0.2	1.6	-0.1	0.1	-1.8	0.5	-0.7
Aug-03	7.2	4.3	2.4	2.7	0.6	-0.2	0.1
Sep-03	-2.7	-0.3	-0.4	-3.2	-2.8	-4.2	3.5
Oct-03	1.9	3.7	3.4	5.4	10.3	2.9	0.3
Nov-03	-0.3	1.2	0.7	-3.5	-2.9	4.0	-1.6

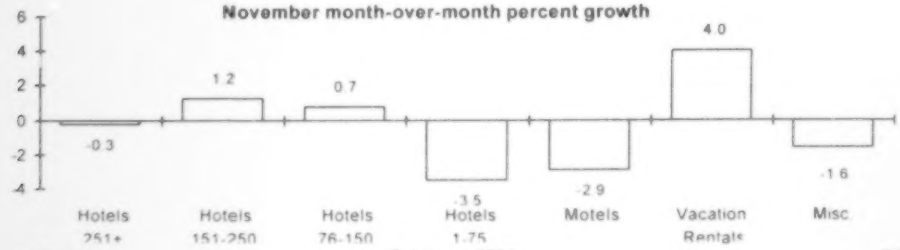


Table 3: Unadjusted Room Revenue by Development Region

Development Region	Revenue				Properties		Rooms	
	($000)		% chg from		(#)	# chg from	(#)	# chg from
	Nov-03	YTD 03	Nov-02	YTD 02	Nov-03	Nov-02	Nov-03	Nov-02
Vancouver Island/Coast								
Total - all accommodation types	**12,747**	**261,170**	**7.0**	**1.5**	**380**	**-1**	**15,204**	**528**
Total - Hotels	8,637	162,746	8.0	-1.4	134	2	8,759	232
76+ Rooms	5,811	109,855	10.6	-2.0	40	3	5,223	249
1-75 Rooms	2,826	52,891	2.8	0.0	94	-1	3,536	-17
Motels	1,665	33,974	7.9	1.1	119	-1	3,218	75
Vacation Rentals	1,207	30,341	9.4	9.9	65	3	1,344	170
Mainland/Southwest								
Total - all accommodation types	**41,374**	**750,947**	**-1.0**	**-5.1**	**402**	**-1**	**35,551**	**-195**
Total - Hotels	38,178	673,710	-1.5	-5.3	228	-6	30,058	-413
251+ Rooms	20,535	370,439	-3.2	-6.3	32	0	12,719	0
151-250 Rooms	6,542	110,447	2.3	-6.5	28	-1	5,294	-202
76-150 Rooms	8,134	142,406	3.6	-2.8	76	-1	8,052	-71
1-75 Rooms	2,967	50,419	-10.3	-2.2	92	-4	3,993	-140
Motels	1,499	25,649	-5.4	-6.5	85	-6	2,770	-190
Vacation Rentals	1,005	31,904	11.8	-6.9	49	3	1,806	25
Thompson/Okanagan								
Total - all accommodation types	**8,037**	**201,663**	**7.6**	**3.4**	**396**	**5**	**15,599**	**139**
Total - Hotels	5,075	107,573	5.5	3.3	98	1	6,935	132
76+ Rooms	3,971	80,226	7.2	3.4	38	1	4,536	145
1-75 Rooms	1,103	27,347	-0.3	3.1	60	0	2,399	-13
Motels	2,606	60,939	12.3	0.7	227	3	7,100	154
Vacation Rentals	209	19,481	42.3	9.0	30	0	661	-108
Kootenay								
Total - all accommodation types	**2,463**	**67,053**	**-0.8**	**-0.4**	**179**	**1**	**6,050**	**90**
Total - Hotels	1,175	25,138	-4.1	-2.0	42	-2	2,297	9
Motels	808	17,652	-7.0	-10.0	93	-3	1,980	-81
Vacation Rentals	87	10,400	28.6	7.1	23	0	896	7
Cariboo								
Total - all accommodation types	**2,621**	**40,850**	**-0.5**	**-3.8**	**107**	**0**	**3,981**	**-120**
Total - Hotels	1,678	22,048	3.0	-4.6	29	1	1,870	-39
Motels	894	14,499	-5.3	-3.5	60	-3	1,930	-70
North Coast								
Total - all accommodation types	**903**	**18,532**	**4.4**	**0.9**	**56**	**3**	**1,689**	**70**
Total - Hotels	533	8,980	2.7	0.4	17	1	892	40
Motels	292	4,845	2.2	-2.9	25	-1	700	8
Nechako								
Total - all accommodation types	**538**	**8,467**	**-8.1**	**0.8**	**41**	**-3**	**1,099**	**-58**
Motels	325	4,801	-6.0	7.7	24	-1	639	-17
Northeast								
Total - all accommodation types	**2,964**	**42,454**	**18.6**	**19.0**	**63**	**0**	**2,786**	**232**
Total - Hotels	1,309	17,567	7.7	9.4	18	-2	1,301	-45
Motels	1,018	11,068	59.3	27.6	32	1	990	98
British Columbia Total								
Total - all accommodation types	**71,647**	**1,391,135**	**2.0**	**-1.7**	**1,624**	**4**	**81,959**	**686**
Fishing lodges	172	18,128	-8.8	4.8	23	-2	377	-7
Total - Hotels	56,725	1,020,107	0.7	-3.5	574	-6	52,466	-121
251+ Rooms	22,743	408,217	-1.9	-6.3	35	0	13,823	0
151-250 Rooms	9,817	170,239	5.0	-4.5	43	-1	8,030	-202
76-150 Rooms	15,322	277,978	4.9	-0.3	167	4	17,263	403
1-75 Rooms	8,843	163,672	-3.7	-0.5	329	-9	13,350	-322
Motels	9,108	173,426	6.8	-0.5	665	-11	19,327	-23
Vacation Rentals	3,150	107,292	10.2	5.2	192	10	5,239	289
Miscellaneous	2,491	72,184	6.0	11.4	170	13	4,550	548

Table 4: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Nov-03	Revenue ($000) YTD 03	% change from Nov-02	% change from YTD 02	Properties (#) Nov-03	Properties # chg from Nov-02	Rooms (#) Nov-03	Rooms # chg from Nov-02
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	**7,182**	**147,939**	**8.1**	**-3.5**	**147**	**-1**	**7,934**	**233**
Total - Hotels	6,128	120,340	10.5	-4.1	65	1	5,322	80
76+ Rooms	4,739	91,303	12.7	-3.6	25	1	3,701	80
1-75 Rooms	1,389	29,037	3.8	-5.5	40	0	1,621	0
Motels	596	13,454	7.6	-2.4	30	-1	1,117	63
Vacation Rentals	163	5,077	3.0	21.6	21	2	326	70
19 Cowichan Valley								
Total - All accommodation types	**454**	**7,780**	**1.0**	**7.6**	**32**	**0**	**638**	**6**
Motels	113	1,695	23.5	1.9	16	1	304	12
21 Nanaimo								
Total - All accommodation types	**1,844**	**34,482**	**8.2**	**5.9**	**64**	**1**	**2,685**	**83**
Total - Hotels	1,033	17,084	2.9	3.2	21	1	1,452	37
Motels	341	7,110	-2.2	2.6	21	-1	575	-34
Vacation Rentals	411	8,548	38.9	9.6	16	1	534	80
23 Alberni-Clayoquot								
Total - All accommodation types	**1,621**	**33,219**	**10.5**	**17.2**	**51**	**-3**	**1,335**	**-71**
Motels	122	3,698	7.1	4.3	20	0	405	0
Vacation Rentals	511	10,929	-1.7	11.6	11	2	276	19
25 Comox-Strathcona								
Total - All accommodation types	**1,271**	**27,501**	**2.1**	**4.8**	**49**	**0**	**1,537**	**95**
Motels	438	6,745	15.3	4.9	23	0	642	34
27 Powell River								
Total - All accommodation types	**156**	**3,031**	**-9.6**	**-5.1**	**15**	**0**	**354**	**0**
43 Mount Waddington								
Total - All accommodation types	**201**	**5,351**	**1.4**	**12.0**	**17**	**2**	**632**	**182**
Total - Hotels	124	3,164	-5.8	10.0	11	2	526	182
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	**1,935**	**33,438**	**-8.0**	**0.2**	**63**	**-2**	**2,506**	**-26**
Total - Hotels	1,372	24,018	-17.9	0.2	22	-1	1,474	-18
Motels	411	6,919	11.4	0.3	35	0	915	3
15 Greater Vancouver								
Total - All accommodation types	**35,331**	**548,082**	**0.8**	**-5.1**	**232**	**3**	**25,751**	**-105**
Total - Hotels	33,712	516,395	1.1	-5.0	161	-2	23,336	-95
251+ Rooms	18,507	282,782	-0.8	-5.3	25	0	9,956	0
151-250 Rooms	6,373	98,076	4.1	-6.9	25	0	4,752	-31
76-150 Rooms	6,646	100,793	3.3	-3.7	54	-1	5,846	-71
1-75 Rooms	2,186	34,745	1.8	-1.0	57	-1	2,782	7
Motels	893	15,088	-7.7	-11.1	36	-2	1,538	-101
Vacation Rentals	411	6,964	-0.6	1.6	14	0	496	6
29 Sunshine Coast								
Total - All accommodation types	**131**	**3,648**	**-42.7**	**-2.1**	**16**	**-3**	**249**	**-113**
31 Squamish-Lillooet								
Total - All accommodation types	**3,976**	**165,779**	**-9.9**	**-5.9**	**91**	**1**	**7,046**	**49**
Total - Hotels	3,053	132,307	-16.5	-7.4	43	-3	5,210	-265
76+ Rooms	2,631	121,312	-7.9	-7.3	24	-1	4,501	-171
1-75 Rooms	422	10,995	-47.3	-8.8	19	-2	709	-94
Vacation Rentals	441	22,416	2.0	-10.7	25	2	1,182	20
Miscellaneous	370	9,279	73.3	42.7	16	2	484	294
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	**1,082**	**36,252**	**5.0**	**4.7**	**95**	**1**	**2,988**	**-65**
Total - Hotels	689	18,169	4.6	4.1	17	0	1,260	0
Motels	340	14,505	9.6	2.8	64	0	1,555	-13
33 Thompson-Nicola								
Total - All accommodation types	**2,165**	**52,231**	**11.1**	**6.9**	**128**	**2**	**5,073**	**98**
Total - Hotels	1,060	23,518	7.3	15.3	32	2	2,144	92
76+ Rooms	859	18,184	5.8	16.6	12	1	1,389	80
1-75 Rooms	202	5,333	14.0	11.1	20	1	755	12
Motels	948	16,495	16.6	-1.3	75	1	2,284	32
35 Central Okanagan								
Total - All accommodation types	**2,733**	**61,466**	**14.1**	**0.0**	**51**	**-1**	**3,064**	**46**

Table 4: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Nov-03	Revenue ($000) YTD 03	% change from Nov-02	% change from YTD 02	Properties (#) Nov-03	Properties # chg from Nov-02	Rooms (#) Nov-03	Rooms # chg from Nov-02
Total - Hotels	2,099	40,624	11.5	-0.2	18	-1	1,706	40
Motels	595	12,908	24.4	1.1	24	-1	1,118	-5
37 North Okanagan								
Total - All accommodation types	**1,020**	**18,169**	**-2.5**	**8.1**	**40**	**2**	**1,613**	**71**
Total - Hotels	678	10,667	-11.1	-1.9	13	0	790	0
Motels	269	4,851	18.9	6.8	19	2	642	122
39 Columbia-Shuswap								
Total - All accommodation types	**1,038**	**33,544**	**-1.5**	**0.8**	**82**	**1**	**2,861**	**-11**
Total - Hotels	548	14,596	5.6	-0.9	18	0	1,035	0
Motels	455	12,180	-7.7	-1.5	45	1	1,501	18
Miscellaneous	25	3,694	-35.9	8.2	16	0	281	-28
Kootenay								
01 East Kootenay								
Total - All accommodation types	**1,382**	**45,462**	**2.9**	**-0.5**	**88**	**0**	**4,069**	**86**
Total - Hotels	551	14,757	-2.4	-2.2	21	-3	1,366	-40
Motels	411	10,064	-6.9	-10.2	43	0	1,093	-11
Miscellaneous	373	11,938	25.3	10.6	14	5	821	148
03 Central Kootenay								
Total - All accommodation types	**775**	**16,314**	**-1.8**	**3.0**	**60**	**2**	**1,344**	**5**
Total - Hotels	522	8,734	-0.3	0.1	15	1	708	49
Motels	199	4,591	-12.2	-7.4	29	-2	529	-59
Vacation Rentals	38	1,242	42.7	49.9	11	1	69	5
05 Kootenay Boundary								
Total - All accommodation types	**306**	**5,277**	**-12.8**	**-8.3**	**31**	**-1**	**637**	**-2**
Motels	197	2,997	-1.3	-12.9	21	-1	358	-11
Cariboo								
41 Cariboo								
Total - All accommodation types	**840**	**15,969**	**-2.4**	**-0.6**	**60**	**1**	**1,592**	**-118**
Motels	526	8,152	0.1	2.1	33	-2	977	-68
53 Fraser-Fort George								
Total - All accommodation types	**1,781**	**24,881**	**0.4**	**-5.7**	**47**	**-1**	**2,389**	**-2**
Total - Hotels	1,413	17,619	4.3	-4.7	19	0	1,407	0
Motels	368	6,347	-12.2	-9.8	27	-1	953	-2
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	**447**	**11,353**	**15.2**	**1.6**	**28**	**3**	**940**	**52**
Motels	98	2,122	12.4	0.2	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	**456**	**7,179**	**-4.3**	**-0.1**	**28**	**0**	**749**	**18**
Motels	194	2,723	-2.3	-5.2	14	-1	372	8
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	**538**	**8,467**	**-8.1**	**0.8**	**41**	**-3**	**1,099**	**-58**
Motels	325	4,801	-6.0	7.7	24	-1	639	-17
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	**2,964**	**42,454**	**18.6**	**19.0**	**63**	**0**	**2,786**	**232**
Total - Hotels	1,309	17,567	7.7	9.4	18	-2	1,301	-45
Motels	1,018	11,068	59.3	27.6	32	1	990	98

Table 5: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue ($000)		Revenue % change from		Properties (#)	Properties # chg from	Rooms (#)	Rooms # chg from
	Nov-03	YTD 03	Nov-02	YTD 02	Nov-03	Nov-02	Nov-03	Nov-02
Vancouver Island/Coast	**12,747**	**261,170**	**7.0**	**1.5**	**380**	**-1**	**15,204**	**528**
Victoria (C)	5,859	117,046	8.6	-5.3	71	-1	5,331	0
Other CRD	1,323	30,893	5.6	4.2	76	0	2,603	233
Nanaimo (C)	1,148	17,354	-1.4	2.8	21	0	1,196	0
Port Alberni (C)	-	-	-	-	12	-1	-	-
Courtenay (C)	-	-	-	-	9	0	-	-
Rest of Development Region	3,712	85,156	6.8	10.1	200	1	5,321	332
Mainland/Southwest	**41,374**	**750,947**	**-1.0**	**-5.1**	**402**	**-1**	**35,551**	**-195**
Downtown Vancouver (C)	21,679	350,808	0.2	-5.6	84	-1	12,908	-145
Other Vancouver (C)	1,735	29,181	-2.0	-8.3	36	2	2,774	3
Richmond (C)	5,999	83,748	3.2	-2.6	23	1	4,321	70
Burnaby (C)	1,753	23,296	-3.4	-5.9	11	-15	1,215	174
Other GVRD	4,164	61,051	3.5	-3.8	78	0	4,533	-42
Whistler (DM)	3,621	159,382	-7.6	-6.5	69	1	6,490	49
Rest of Development Region	2,422	43,483	-14.3	1.4	101	11	3,310	-304
Thompson/Okanagan	**8,037**	**201,663**	**7.6**	**3.4**	**396**	**5**	**15,599**	**139**
Penticton (C)	703	21,175	7.2	5.4	41	-1	1,791	-13
Kamloops (C)	1,593	38,389	14.2	10.5	59	3	3,437	131
Kelowna (C)	2,561	54,886	14.5	0.8	42	0	2,629	43
Vernon (C)	999	16,915	-2.4	11.0	32	1	1,494	67
Rest of Development Region	2,180	70,297	0.9	-0.4	222	2	6,248	-89
Kootenay	**2,463**	**67,053**	**-0.8**	**-0.4**	**179**	**1**	**6,050**	**90**
Cranbrook (C)	483	7,530	2.4	-6.0	17	0	794	0
Rest of Development Region	1,980	59,523	-1.6	0.4	162	1	5,256	90
Cariboo	**2,621**	**40,850**	**-0.5**	**-3.8**	**107**	**0**	**3,981**	**-120**
Quesnel (C)	231	3,290	4.8	5.2	12	1	427	7
Williams Lake (C)	281	4,312	-10.7	-1.9	11	-1	534	-46
Prince George (C)	1,501	18,826	-2.7	-5.1	28	-1	1,672	-2
Rest of Development Region	609	14,421	9.1	-4.4	56	1	1,348	-79
North Coast	**903**	**18,532**	**4.4**	**0.9**	**56**	**3**	**1,689**	**70**
Prince Rupert (C)	358	6,556	8.7	-0.8	15	1	761	40
Rest of Development Region	237	7,935	-2.5	4.8	32	3	565	63
Nechako	**538**	**8,467**	**-8.1**	**0.8**	**41**	**-3**	**1,099**	**-58**
Smithers (T)	253	3,931	-8.5	-3.8	14	-1	414	-17
Rest of Development Region	285	4,536	-7.7	5.1	27	-2	685	254
Northeast	**2,564**	**42,454**	**18.8**	**19.0**	**63**	**0**	**2,786**	**232**
Dawson Creek (C)	529	5,547	54.0	20.4	15	0	499	0
Fort St. John (C)	1,028	17,690	6.7	4.9	18	0	996	0
Rest of Development Region	1,407	19,218	18.0	35.3	30	0	1,291	232

Table 6: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
1998	219,677	686,970	155,799	47,223	42,381	17,923	8,932	27,183	1,206,090
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
Quarterly data									
2002 Q3	116,167	276,322	90,689	26,530	16,318	8,472	3,262	9,143	546,901
2002 Q4	41,750	156,673	31,188	10,869	6,420	2,666	2,056	7,911	261,533
2003 Q1	39,094	208,010	40,408	20,482	7,500	2,819	1,579	15,935	335,826
2003 Q2	71,691	189,501	49,634	14,641	11,457	5,056	2,104	8,831	352,915
2003 Q3	117,734	259,792	89,796	25,224	15,497	8,549	3,291	11,276	531,158
Monthly data									
Jun-02	29,781	82,346	20,189	5,816	4,522	2,600	933	2,470	148,656
Jul-02	39,602	95,896	32,324	8,388	5,194	3,094	1,054	2,724	188,277
Aug-02	45,865	105,008	37,405	10,938	5,967	3,024	1,105	3,035	212,347
Sep-02	30,699	75,418	20,960	7,203	5,157	2,353	1,103	3,384	146,278
Oct-02	18,599	55,507	13,381	3,962	3,723	1,147	1,030	3,187	100,536
Nov-02	11,910	41,802	7,472	2,484	2,635	86	586	2,499	70,252
Dec-02	11,241	59,364	10,335	4,423	2,063	654	441	2,225	90,745
Jan-03	9,564	62,257	12,122	5,439	2,250	732	442	4,008	96,814
Feb-03	12,874	72,408	13,523	7,301	2,260	966	534	5,071	114,937
Mar-03	16,656	73,344	14,763	7,743	2,990	1,120	603	6,855	124,075
Apr-03	18,409	55,669	11,893	4,344	3,192	1,006	510	3,493	98,516
May-03	24,458	64,094	16,335	4,667	3,780	1,441	666	2,452	117,893
Jun-03	28,824	69,739	21,406	5,630	4,485	2,608	928	2,885	136,505
Jul-03	39,336	86,041	32,819	8,643	5,169	3,103	1,058	3,762	179,932
Aug-03	46,994	101,199	36,958	9,969	5,569	3,107	1,142	3,978	208,916
Sep-03	31,403	72,552	20,018	6,613	4,759	2,338	1,091	3,536	142,310
Oct-03	19,904	52,270	13,787	4,244	3,775	1,206	954	3,450	99,590
Nov-03	12,747	41,374	8,037	2,463	2,621	903	538	2,964	71,647
Year-over-year percent changes									
Jun-02	2.5	2.2	5.2	13.0	3.4	-7.3	0.0	-6.0	2.7
Jul-02	0.0	-4.0	5.8	2.2	-3.2	-4.5	-9.3	-8.3	-1.4
Aug-02	2.6	0.9	9.2	13.7	6.8	2.3	-9.9	-4.0	3.3
Sep-02	7.4	4.5	3.4	3.1	4.6	4.5	7.7	13.5	5.1
Oct-02	5.5	16.1	15.7	1.3	8.5	-9.0	15.6	9.2	12.4
Nov-02	2.0	0.1	6.0	-6.1	3.8	-0.2	6.5	-6.2	0.7
Dec-02	5.5	7.7	5.4	1.6	-3.1	-1.4	1.4	-18.5	5.7
Jan-03	6.6	10.5	16.1	4.4	-11.1	1.6	7.1	-0.3	9.2
Feb-03	3.3	5.6	8.8	8.8	-18.1	-3.2	24.2	3.9	5.2
Mar-03	0.5	-8.6	3.9	3.0	-0.6	3.4	-6.8	61.2	-2.7
Apr-03	2.2	-11.6	9.2	2.2	5.8	6.8	3.6	5.2	-5.2
May-03	-1.1	-4.1	6.3	-3.0	-4.0	-6.1	9.4	28.6	-1.5
Jun-03	-3.2	-15.3	6.0	-3.2	-0.8	0.3	-0.6	16.8	-8.2
Jul-03	-0.7	-10.3	1.5	3.0	-0.5	0.3	0.4	38.1	-4.4
Aug-03	2.5	-3.6	-1.2	-8.9	-6.7	2.7	3.3	31.1	-1.6
Sep-03	2.3	-3.8	-4.5	-8.2	-7.7	-0.6	-1.1	4.5	-2.7
Oct-03	7.0	-5.8	3.0	7.1	1.4	5.1	-7.3	8.2	-0.9
Nov-03	7.0	-1.0	7.6	-0.8	-0.5	4.4	-8.1	18.6	2.0

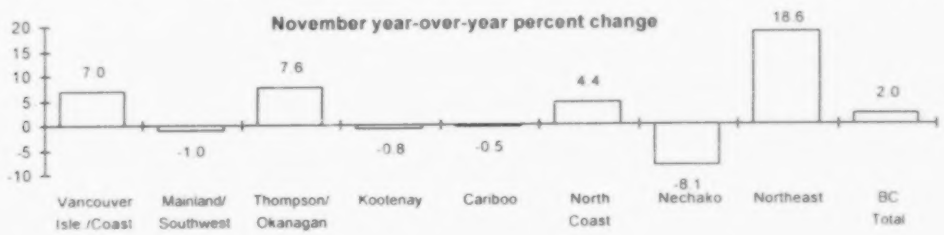


Table 7: Traveller Entries to Canada via BC, Unadjusted (000s)

Period	International								Canadian		
	Total	USA			Overseas				Total	USA same-day auto	Overseas
		Total	Same-day	Overnight	Total	Asia	Europe	Oceania*			
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0	9,588.1	5,813.1	798.7
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8	9,435.2	5,639.0	866.4
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9	8,328.6	4,720.3	902.8
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0	7,197.3	3,586.8	927.5
2003	7,335.3	6,137.4	2,642.1	3,495.4	1,197.8	577.6	410.1	124.8	7,285.2	3,744.3	941.8
Quarterly data											
2002 Q4	1,462.4	1,211.8	582.3	629.6	250.6	149.3	63.4	24.4	1,576.4	827.8	208.1
2003 Q1	1,330.4	1,115.7	520.0	595.7	214.7	116.6	63.4	24.3	1,608.4	779.3	299.6
2003 Q2	1,843.4	1,561.8	698.1	863.7	281.6	110.0	114.1	35.8	1,730.4	921.6	177.8
2003 Q3	2,833.6	2,361.5	902.5	1,458.9	472.1	217.4	173.0	41.7	2,309.5	1,170.6	227.4
2003 Q4	1,327.9	1,098.5	521.4	577.1	229.4	133.4	59.6	23.0	1,636.9	872.7	237.0
Monthly data											
Jul-02	1,110.0	915.8	325.4	590.5	194.2	104.8	60.2	13.3	759.5	373.6	64.8
Aug-02	1,163.6	980.0	340.3	639.8	183.5	96.4	61.1	13.2	831.0	392.1	88.4
Sep-02	745.9	595.2	264.7	330.5	150.7	79.4	49.7	13.7	625.0	303.9	64.1
Oct-02	503.3	406.6	194.7	212.0	96.7	63.6	22.8	6.2	560.5	290.9	63.4
Nov-02	438.9	373.6	196.5	177.1	65.3	40.2	16.4	5.7	506.8	270.2	67.6
Dec-02	520.2	431.6	191.1	240.5	88.6	45.4	24.2	12.4	509.0	266.7	77.1
Jan-03	437.5	364.6	182.1	182.5	72.9	39.1	17.9	11.8	535.2	255.8	110.4
Feb-03	444.1	377.0	166.9	210.1	67.1	35.0	22.1	6.9	483.5	246.3	83.3
Mar-03	448.8	374.1	171.0	203.1	74.6	42.5	23.3	5.6	589.7	277.2	105.9
Apr-03	448.3	378.5	183.4	195.1	69.9	31.9	25.0	6.1	516.7	267.6	67.6
May-03	611.3	521.4	239.8	281.6	89.9	31.1	38.7	14.4	602.1	318.3	57.1
Jun-03	783.8	661.9	274.9	387.0	121.9	47.0	50.4	15.2	611.6	335.7	53.1
Jul-03	1,024.8	861.4	313.1	548.3	163.4	71.0	61.4	13.2	772.3	398.5	64.2
Aug-03	1,118.8	947.5	339.6	607.9	171.2	81.7	62.8	13.7	903.9	446.4	95.2
Sep-03	690.0	552.5	249.9	302.7	137.5	64.8	48.9	14.9	633.3	325.7	68.1
Oct-03	454.2	371.7	179.8	191.9	82.5	52.0	21.9	5.5	560.6	302.6	71.2
Nov-03	393.2	333.5	173.4	160.1	59.7	36.4	14.4	5.3	548.0	293.3	78.4
Dec-03	480.5	393.3	168.3	225.0	87.2	45.0	23.2	12.3	528.4	276.9	87.4
Year-over-year percent changes											
Jul-02	-7.5	-7.3	-23.3	4.7	-8.5	-1.6	-15.8	-6.6	-22.3	-35.3	1.3
Aug-02	-5.2	-4.4	-19.7	6.4	-9.3	-2.4	-17.9	-3.1	-20.0	-34.3	1.3
Sep-02	5.8	6.4	2.6	9.6	3.7	17.8	-10.9	-7.4	7.6	2.8	0.7
Oct-02	23.4	22.6	25.5	20.0	26.8	48.7	-4.4	0.1	21.2	34.5	5.2
Nov-02	12.5	11.0	15.9	5.9	22.1	30.9	7.6	19.5	16.8	24.5	10.9
Dec-02	2.2	2.4	5.3	0.2	1.1	-3.1	-0.6	17.4	9.6	9.9	11.7
Jan-03	7.4	7.4	10.4	4.6	7.7	1.7	2.2	38.4	8.6	16.0	7.2
Feb-03	-3.4	-3.0	-4.2	-2.0	-5.9	-14.3	4.3	6.4	5.2	8.4	7.6
Mar-03	-11.7	-10.7	-9.9	-11.4	-16.2	-12.5	-13.4	-18.2	-1.1	-1.3	11.4
Apr-03	-10.9	-9.2	-8.9	-9.5	-19.1	-42.1	14.0	0.9	-13.7	-12.2	-21.8
May-03	-13.9	-10.3	-8.3	-12.0	-29.9	-56.1	0.9	16.7	-5.2	-0.7	-23.7
Jun-03	-13.0	-11.5	-9.5	-12.9	-20.4	-41.4	-2.1	16.7	-1.9	0.1	-18.6
Jul-03	-7.7	-5.9	-3.8	-7.1	-15.9	-32.3	1.9	-0.9	1.7	6.7	-1.0
Aug-03	-3.9	-3.3	-0.2	-5.0	-6.7	-15.2	2.8	3.4	8.8	13.9	7.6
Sep-03	-7.5	-7.2	-5.6	-8.4	-8.8	-18.4	-1.7	8.5	1.3	7.1	6.2
Oct-03	-9.7	-8.6	-7.7	-9.5	-14.6	-18.2	-3.8	-12.1	0.0	4.0	12.3
Nov-03	-10.4	-10.7	-11.8	-9.6	-8.7	-9.4	-12.0	-8.3	8.1	8.5	15.9
Dec-03	-7.5	-8.9	-11.9	-6.4	-1.5	-1.0	-4.0	-1.4	3.8	3.8	13.4

*** Australia, New Zealand, and other South Pacific nations**
SOURCE: Statistics Canada

Table 8: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International								Canadian		
	Total	USA			Overseas				Total	USA same-day auto	Overseas
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**			
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0	9,588.1	5,813.1	798.7
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8	9,435.2	5,639.0	866.4
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9	8,328.6	4,720.3	902.8
2002	7,960.1	6,583.2	2,808.1	3,787.8	1,376.9	764.0	411.8	118.0	7,187.8	3,582.5	924.9
2003	7,325.9	6,128.2	2,642.1	3,495.4	1,197.7	577.6	410.1	124.8	7,260.8	3,726.9	934.5
Quarterly data											
2002 Q4	2,057.9	1,695.5	732.3	967.3	362.4	198.7	108.7	32.3	1,881.8	975.9	238.4
2003 Q1	1,885.5	1,569.6	670.5	899.8	315.9	162.5	106.6	31.3	1,790.8	913.2	235.3
2003 Q2	1,751.4	1,485.6	642.0	846.4	265.8	98.3	101.5	31.1	1,659.6	839.6	194.1
2003 Q3	1,851.0	1,550.9	674.2	877.8	300.1	144.0	100.3	31.7	1,869.3	958.4	239.4
2003 Q4	1,838.1	1,522.2	655.2	871.4	315.9	172.8	101.7	30.7	1,941.1	1,015.7	265.8
Monthly data											
Jul-02	653.5	543.5	228.5	317.8	110.0	63.4	31.4	10.1	597.6	283.9	76.8
Aug-02	673.3	559.2	230.7	316.1	114.1	60.3	31.8	10.1	602.9	293.4	76.0
Sep-02	664.7	549.9	233.7	307.8	114.8	64.8	32.7	9.9	620.6	305.5	78.2
Oct-02	699.8	571.4	240.1	334.7	128.4	72.8	34.2	10.6	625.6	321.2	77.7
Nov-02	678.8	558.9	248.0	315.1	119.9	65.9	39.2	11.0	628.4	330.7	79.2
Dec-02	679.3	565.2	244.3	317.6	114.1	60.0	35.4	10.8	627.9	324.0	81.5
Jan-03	661.1	548.3	242.0	309.6	112.7	58.2	35.9	12.5	612.1	315.9	77.3
Feb-03	630.6	526.2	224.0	303.1	104.4	52.4	37.1	10.3	603.3	309.2	77.7
Mar-03	593.8	495.1	204.5	287.0	98.8	52.0	33.7	8.6	575.3	288.1	80.2
Apr-03	583.3	493.1	210.7	282.6	90.2	36.1	35.1	9.3	514.8	256.0	64.9
May-03	574.6	490.6	213.2	277.3	84.0	27.4	33.4	10.8	559.8	289.2	60.0
Jun-03	593.6	501.9	218.1	286.6	91.6	34.7	33.0	11.0	585.1	294.4	69.2
Jul-03	607.7	512.5	221.1	290.7	95.1	40.7	33.3	10.3	600.9	302.0	76.1
Aug-03	623.3	521.5	226.7	296.2	101.8	50.4	33.6	10.6	632.6	324.6	81.5
Sep-03	620.0	516.8	226.5	291.0	103.1	52.9	33.4	10.8	635.8	331.8	81.8
Oct-03	616.3	511.1	223.8	292.2	105.2	57.3	33.6	9.8	629.8	332.7	86.6
Nov-03	609.2	504.3	215.8	287.8	104.9	57.5	34.1	10.3	658.3	345.5	91.3
Dec-03	612.6	506.8	215.6	291.4	105.8	58.0	33.9	10.6	652.9	337.6	87.9
Month-over-month percent changes											
Jul-02	-0.4	-1.0	-2.2	-0.5	2.5	3.1	-3.3	7.8	1.6	-0.6	-1.8
Aug-02	3.0	2.9	1.0	-0.5	3.7	-4.9	1.1	0.2	0.9	3.4	-1.1
Sep-02	-1.3	-1.7	1.3	-2.6	0.5	7.4	2.9	-2.2	2.9	4.1	2.8
Oct-02	5.3	3.9	2.8	8.7	11.9	12.4	4.6	7.0	0.8	5.1	-0.6
Nov-02	-3.0	-2.2	3.3	-5.9	-6.6	-9.6	14.7	3.6	0.4	2.9	1.9
Dec-02	0.1	1.1	-1.5	0.8	-4.8	-9.0	-9.7	-1.7	-0.1	-2.0	3.0
Jan-03	-2.7	-3.0	-0.9	-2.5	-1.2	-3.0	1.4	15.9	-2.5	-2.5	-5.1
Feb-03	-4.6	-4.0	-7.4	-2.1	-7.4	-10.0	3.4	-17.5	-1.4	-2.1	0.5
Mar-03	-5.8	-5.9	-8.7	-5.3	-5.4	-0.7	-9.1	-16.7	-4.6	-6.8	3.1
Apr-03	-1.8	-0.4	3.0	-1.6	-8.7	-30.5	4.1	7.9	-10.5	-11.2	-19.1
May-03	-1.5	-0.5	1.2	-1.9	-6.9	-24.0	-4.6	16.9	8.7	13.0	-7.6
Jun-03	3.3	2.3	2.3	3.3	9.1	26.5	-1.4	1.8	4.5	1.8	15.4
Jul-03	2.4	2.1	1.4	1.4	3.8	17.3	0.9	-6.2	2.7	2.6	9.9
Aug-03	2.6	1.8	2.5	1.9	7.0	23.7	1.0	2.7	5.3	7.5	7.1
Sep-03	-0.5	-0.9	-0.1	-1.8	1.3	5.1	-0.6	1.5	0.5	2.2	0.3
Oct-03	-0.6	-1.1	-1.2	0.4	2.0	8.3	0.6	-9.1	-0.9	0.3	5.9
Nov-03	-1.2	-1.3	-3.6	-1.5	-0.3	0.2	1.5	4.7	4.5	3.8	5.5
Dec-03	0.6	0.5	-0.1	1.2	0.9	0.9	-0.5	3.7	-0.8	-2.3	-3.7

*** Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total**

**** Australia, New Zealand, and other South Pacific nations**

SOURCE: BC STATS, Statistics Canada

Table 9: Transportation Indicators (Historical)

Period	Air Passenger Traffic (000s)								Other Transportation (000s)		
	Vancouver				Victoria	Kelowna	Prince George	Comox Valley	BC Ferries		Coquihalla Hwy
	Total	Domestic	Trans-border	Other Int'l.	Total	Total	Total	Total	Vehicles	Passengers	Passenger Vehicles
1999	15,806	8,314	4,120	3,372	1,191.4	815.1	352.2	62.8	7,852	21,369	2,378
2000	16,033	8,306	4,074	3,652	1,139.2	835.9	392.9	72.6	7,887	21,280	2,389
2001	15,477	7,869	4,000	3,608	1,158.2	850.3	361.9	132.1	8,104	21,309	2,449
2002	14,878	7,422	3,855	3,600	1,102.2	836.9	325.4	148.7	8,272	21,540	2,518
2003	14,322	7,267	3,814	3,241	1,182.9	863.6	339.8	166.8	8,263	21,339	2,466
Quarterly data											
2002 Q4	3,319	1,747	780	793	263.9	207.8	89.1	34.7	1,860	4,627	480
2003 Q1	3,308	1,621	883	803	258.1	220.8	85.2	32.2	1,655	4,030	358
2003 Q2	3,285	1,723	909	652	289.1	193.9	82.6	38.1	2,113	5,388	679
2003 Q3	4,393	2,136	1,256	1,001	331.8	227.5	83.4	54.6	2,710	7,535	970
2003 Q4	3,336	1,786	766	784	303.9	221.5	88.6	41.8	1,785	4,386	459
Monthly data											
Jul-02	1,552	718	466	367	98.1	74.9	27.3	16.0	921	2,630	361
Aug-02	1,661	790	470	401	110.9	83.5	27.4	17.7	1,013	2,975	415
Sep-02	1,308	642	332	334	90.4	65.3	26.2	12.6	752	1,927	251
Oct-02	1,198	641	263	293	95.7	69.7	29.6	12.3	667	1,670	203
Nov-02	963	507	227	229	77.9	60.2	28.2	9.3	574	1,385	126
Dec-02	1,158	599	289	270	90.3	77.9	31.3	13.2	619	1,572	151
Jan-03	1,119	537	292	289	78.8	72.8	27.1	10.2	522	1,253	103
Feb-03	1,030	513	277	240	84.1	69.8	27.5	10.1	519	1,244	113
Mar-03	1,159	570	314	274	95.2	78.3	30.6	11.9	614	1,533	142
Apr-03	970	522	244	203	94.3	63.1	27.0	12.3	646	1,608	191
May-03	1,083	584	299	200	98.9	65.9	29.3	12.5	714	1,827	232
Jun-03	1,232	618	366	249	95.9	64.9	26.3	13.3	753	1,953	257
Jul-03	1,483	715	453	314	109.8	78.6	27.2	19.1	930	2,618	356
Aug-03	1,641	784	482	375	121.8	84.0	29.2	20.4	1,032	3,032	388
Sep-03	1,269	636	321	312	100.2	64.9	27.0	15.2	748	1,885	226
Oct-03	1,161	636	248	276	110.5	70.4	29.9	14.3	672	1,657	209
Nov-03	985	524	233	229	88.6	66.0	27.3	11.2	570	1,358	112
Dec-03	1,191	626	285	279	104.8	85.0	31.4	16.4	543	1,371	138
Year-over-year percent changes											
Jul-02	-7.6	-10.0	-3.9	-7.1	-13.2	-6.3	-15.4	n/a	2.3	1.2	6.3
Aug-02	-7.7	-8.2	-8.7	-5.5	-8.9	-1.7	-12.0	n/a	2.4	2.9	3.5
Sep-02	12.6	12.4	23.1	4.0	13.1	11.8	1.1	n/a	3.0	1.3	0.1
Oct-02	12.5	7.1	16.9	21.7	0.0	5.7	2.9	n/a	4.1	5.0	7.8
Nov-02	4.7	-1.9	7.0	20.1	0.1	-1.4	6.0	n/a	1.1	2.2	3.6
Dec-02	4.3	1.8	9.3	5.0	1.5	4.3	10.8	n/a	3.7	3.1	9.7
Jan-03	2.8	-0.1	4.3	7.0	2.9	8.3	6.2	2.2	5.0	5.2	5.8
Feb-03	-0.6	-1.0	2.0	-2.9	7.4	2.0	13.0	-1.6	4.2	4.0	7.8
Mar-03	-1.4	-2.4	4.6	-5.5	0.2	5.0	18.3	3.6	0.8	-1.6	-11.9
Apr-03	-13.6	-10.8	-8.1	-25.1	-0.8	-0.6	6.9	10.1	1.1	2.8	12.5
May-03	-13.2	-9.3	-2.7	-32.5	0.3	-1.0	6.8	-0.4	-2.5	-3.1	-0.4
Jun-03	-9.8	-5.7	-4.4	-24.4	0.6	-0.5	-2.3	8.2	0.3	-1.7	4.3
Jul-03	-4.5	-0.4	-2.8	-14.4	11.9	5.0	-0.7	19.4	1.0	-0.5	-1.4
Aug-03	-1.2	-0.7	2.7	-6.6	9.8	0.5	6.6	14.9	1.9	1.9	-6.5
Sep-03	-3.0	-0.9	-3.4	-6.7	10.8	-0.7	3.2	20.8	-0.5	-2.2	-9.7
Oct-03	-3.1	-0.8	-5.7	-5.9	15.5	1.1	0.9	16.2	0.7	-0.8	3.1
Nov-03	2.2	3.3	2.4	-0.2	13.7	9.6	-3.2	20.7	-0.7	-1.9	-11.2
Dec-03	2.8	4.6	-1.5	3.4	16.1	9.1	0.3	24.7	-12.3	-12.8	-8.8

Table 10: Tourism Sector Indicators

Period	Employment (000s) [1]						Hotel Industry [2]		Consumer Price Index [1]	
	BC Total	Key industries in tourism sector								
	Industrial aggregate	Air transport	Heritage Institutions	Accom-modation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) [3]	Room Rate ($)	Traveller accom-modation	Restaurant food
1999	1,513.9	15.3	2.3	29.2	110.1	24.7	61.7	112.02	133.1	115.6
2000	1,574.3	14.8	2.3	28.2	116.7	26.5	60.0	114.04	139.4	117.6
2001	1,595.4	13.5	2.4	29.5	117.8	27.4	59.3	116.12	133.4	121.3
2002	1,612.7	12.2	2.5	29.2	118.1	28.8	58.9	116.99	124.2	125.4
2003	1,639.2	12.7	2.8	28.9	117.6	30.6	58.3	115.02	111.8	127.6
Quarterly data										
2002 Q4	1,632.6	12.6	2.6	28.2	117.9	28.9	48.0	103.00	108.3	126.3
2003 Q1	1,615.3	12.8	2.5	26.9	114.0	29.8	51.9	117.66	104.8	126.9
2003 Q2	1,657.7	13.1	2.8	29.4	118.8	32.5	59.4	113.68	116.1	126.9
2003 Q3	1,639.6	12.7	3.1	32.0	120.6	31.4	72.3	127.13	127.5	128.1
2003 Q4	1,644.1	12.4	2.9	27.5	117.0	28.8	49.6	101.59	99.0	128.5
Monthly data										
Jul-02	1,616.3	12.6	2.6	31.9	122.8	30.2	74.0	135.36	149.8	125.6
Aug-02	1,618.3	12.6	2.6	32.4	122.8	30.2	80.0	135.68	148.8	126.0
Sep-02	1,642.4	12.4	2.6	29.9	121.3	29.5	67.2	121.04	138.1	126.1
Oct-02	1,643.1	12.3	2.6	29.5	121.3	29.4	56.3	101.16	115.9	126.1
Nov-02	1,632.8	12.5	2.6	27.9	116.6	28.4	45.6	92.87	105.3	126.2
Dec-02	1,621.9	13.0	2.6	27.3	115.9	29.1	42.2	114.97	103.7	126.7
Jan-03	1,606.2	12.5	2.5	27.8	114.4	29.5	44.2	117.82	104.0	126.9
Feb-03	1,614.7	12.7	2.5	26.5	113.1	29.3	54.7	121.26	106.3	127.0
Mar-03	1,625.1	13.2	2.4	26.4	114.4	30.5	56.9	113.91	104.1	126.9
Apr-03	1,638.4	13.0	2.8	27.7	117.0	32.2	55.6	104.95	105.8	126.8
May-03	1,657.1	13.1	2.7	29.5	119.8	32.5	60.0	113.92	118.1	126.9
Jun-03	1,677.5	13.1	3.1	30.9	119.7	32.9	62.6	122.17	124.3	127.1
Jul-03	1,636.4	12.9	3.2	32.0	122.4	31.9	71.1	130.51	129.8	127.8
Aug-03	1,637.9	12.6	3.2	33.2	122.0	31.9	79.5	131.13	131.0	128.3
Sep-03	1,644.4	12.7	2.9	30.9	117.5	30.4	66.2	119.75	121.7	128.2
Oct-03	1,654.6	12.5	2.9	29.2	118.2	28.9	56.8	100.28	110.0	128.3
Nov-03	1,637.5	12.4	2.8	27.1	116.3	28.1	48.0	91.15	94.6	128.6
Dec-03	1,640.1	12.3	2.9	26.3	116.6	29.3	44.0	113.34	92.4	128.5
Year-over-year percent changes										
Jul-02	1.2	-5.7	4.3	-4.6	1.2	6.5	-0.9	-0.9	-5.7	3.4
Aug-02	1.3	-6.9	3.6	-4.1	1.2	6.4	0.5	-0.2	-6.8	3.2
Sep-02	1.7	-5.6	4.8	-6.0	1.4	4.6	3.1	1.2	-8.1	3.1
Oct-02	1.6	-4.6	3.8	-3.1	2.0	4.2	5.1	0.8	-6.0	2.6
Nov-02	2.4	5.9	7.9	-2.5	3.1	5.0	0.6	-0.4	-3.7	2.6
Dec-02	2.6	10.8	11.3	-1.8	2.6	7.7	0.6	3.5	-3.9	2.8
Jan-03	2.4	9.0	4.3	0.7	2.1	9.7	1.4	5.3	-5.8	2.3
Feb-03	2.7	8.9	3.0	-3.1	2.3	6.8	0.5	2.6	-7.5	2.1
Mar-03	2.6	12.5	1.9	-3.9	1.9	10.5	-0.6	-4.8	-8.0	1.8
Apr-03	2.5	7.5	18.0	-1.0	0.1	14.7	-2.9	-2.4	-7.2	1.6
May-03	2.5	7.6	4.2	0.6	-1.5	12.5	-1.4	-1.5	-11.6	1.8
Jun-03	2.4	10.1	20.8	-1.7	-2.3	10.8	-4.6	-6.0	-12.6	1.5
Jul-03	1.2	2.5	22.5	0.1	-0.3	5.4	-2.9	-3.6	-13.4	1.8
Aug-03	1.2	0.4	21.3	2.4	-0.7	5.5	-0.5	-3.4	-12.0	1.8
Sep-03	0.1	1.8	10.1	3.3	-3.1	3.1	-1.0	-1.1	-11.9	1.7
Oct-03	0.7	1.1	10.6	-0.9	-2.6	-1.7	0.5	-0.9	-5.1	1.7
Nov-03	0.3	-0.7	10.7	-2.7	-0.2	-1.0	2.4	-1.9	-10.2	1.9
Dec-03	1.1	-5.9	10.9	-3.6	0.6	1.0	1.8	-1.4	-10.9	1.4

[1]Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours)

[2]Source: Pannell Kerr Forster

[3]Occupancy Rate change expressed as percentage point change

Table 11: BC Restaurant and Tavern Receipts

Period	Restaurants and Taverns [1]						
	BC	Receipts ($ million)					
	Total [2] locations	Total	Full service	Limited service	Food service contractors	Social & mobile caterers	Drinking places
1999	8,606	4,467.5	2,188.8	1,616.5	214.3	78.2	369.8
2000	9,060	4,831.5	2,482.6	1,640.1	256.5	93.4	358.9
2001	8,706	5,176.3	2,762.5	1,690.1	274.1	91.6	357.9
2002	8,083	5,101.2	2,728.3	1,720.2	254.3	92.6	305.9
2003	8,232	5,390.5	2,915.0	1,871.0	237.8	81.8	284.9
Quarterly data							
2002 Q4	8,079	1,241.3	650.0	442.2	61.1	18.7	69.3
2003 Q1	8,278	1,225.7	660.6	411.5	71.8	14.3	67.6
2003 Q2	8,046	1,303.2	702.5	461.9	47.2	15.4	76.2
2003 Q3	8,168	1,486.4	820.7	504.5	57.9	27.0	76.2
2003 Q4	8,434	1,375.2	731.2	493.2	60.9	25.1	64.9
Monthly data							
Jul-02	7,939	459.3	252.3	153.9	19.8	5.9	27.2
Aug-02	8,014	476.4	266.3	157.2	19.7	6.0	27.3
Sep-02	7,971	415.0	221.5	140.1	21.9	6.9	24.6
Oct-02	7,950	401.1	201.2	148.9	21.1	6.2	23.7
Nov-02	8,116	412.8	218.7	146.2	19.6	5.2	23.1
Dec-02	8,172	427.4	230.1	147.0	20.4	7.4	22.5
Jan-03	8,322	404.1	217.2	136.4	24.8	4.1	21.5
Feb-03	8,320	388.9	209.7	129.5	22.2	5.3	22.1
Mar-03	8,193	432.7	233.7	145.5	24.8	4.8	23.9
Apr-03	8,137	417.9	220.1	151.7	15.5	4.4	26.1
May-03	7,997	438.8	236.4	156.6	15.2	5.4	25.1
Jun-03	8,004	446.6	246.0	153.6	16.5	5.6	25.0
Jul-03	8,043	496.6	271.1	174.7	17.7	5.9	27.2
Aug-03	8,184	530.2	297.3	176.9	19.5	9.9	26.7
Sep-03	8,276	459.5	252.4	152.9	20.7	11.2	22.3
Oct-03	8,290	453.5	240.6	162.1	20.6	8.2	22.0
Nov-03	8,544	448.0	229.6	171.6	18.9	7.2	20.6
Dec-03	8,469	473.8	260.9	159.5	21.4	9.6	22.3
Year-over-year percent changes							
Jul-02	-9.8	-4.0	-2.7	0.1	-14.5	-14.8	-22.6
Aug-02	-9.4	-3.6	-1.8	-1.4	-15.5	-21.1	-16.0
Sep-02	-10.3	-4.2	-3.6	-0.8	-0.9	-31.7	-17.9
Oct-02	-8.7	-1.3	-4.2	9.1	-1.0	-27.4	-20.7
Nov-02	-5.6	5.1	7.1	8.1	1.0	-26.9	-13.9
Dec-02	-1.6	-0.9	-0.9	4.0	-2.3	-27.5	-15.2
Jan-03	1.1	5.2	6.6	8.4	6.1	-40.4	-11.5
Feb-03	0.0	-1.8	-0.6	2.2	-10.6	-33.2	-14.0
Mar-03	-1.0	-0.1	0.2	5.3	-1.3	-32.2	-19.1
Apr-03	0.7	0.3	-0.3	7.4	-21.5	-46.6	-0.6
May-03	0.2	0.6	2.8	5.0	-18.9	-55.5	-4.1
Jun-03	0.8	0.8	2.7	5.4	-17.2	-55.9	-1.9
Jul-03	1.3	8.1	7.4	13.5	-10.7	-0.1	0.1
Aug-03	2.1	11.3	11.6	12.5	-0.6	63.8	-2.2
Sep-03	3.8	10.7	13.9	9.1	-5.4	62.8	-9.3
Oct-03	4.3	13.1	19.6	8.8	-2.6	33.4	-7.2
Nov-03	5.3	8.5	5.0	17.3	-3.2	39.2	-10.7
Dec-03	3.6	10.8	13.4	8.5	4.6	31.0	-0.9

[1]Source: Statistics Canada

[2]The number of locations (physical place in which business activity is conducted) operated in BC during the reporting month.

Note: with the change to NAICS (North American Industry Classification System) coding, many of the series are not available prior to January 1999.

Table 12: BC Restaurant and Tavern Receipts Seasonally Adjusted

Period	Restaurants and Taverns [1]					
	Receipts ($ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
1999	4,467.5	369.8	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
2003	5,390.5	284.9	5,105.6	33,660.8	2,091.7	31,569.1
Quarterly data						
2002 Q4	1,294	73	1,220	8,394	562	7,831
2003 Q1	1,289	72	1,217	8,301	532	7,769
2003 Q2	1,292	73	1,219	8,281	527	7,754
2003 Q3	1,381	71	1,309	8,442	524	7,918
2003 Q4	1,429	69	1,360	8,637	509	8,128
Monthly data						
Jul-02	419	25	395	2,792	186	2,606
Aug-02	415	24	391	2,771	179	2,592
Sep-02	416	25	391	2,795	192	2,604
Oct-02	420	24	396	2,779	188	2,591
Nov-02	442	25	417	2,787	188	2,599
Dec-02	432	24	407	2,828	187	2,641
Jan-03	433	24	409	2,759	176	2,584
Feb-03	429	24	404	2,769	178	2,590
Mar-03	427	23	403	2,773	178	2,595
Apr-03	431	25	406	2,723	179	2,544
May-03	431	24	407	2,778	173	2,605
Jun-03	431	24	406	2,780	175	2,605
Jul-03	453	24	428	2,794	182	2,612
Aug-03	463	24	439	2,820	174	2,646
Sep-03	465	23	442	2,828	168	2,660
Oct-03	472	22	450	2,866	169	2,697
Nov-03	479	23	456	2,887	170	2,716
Dec-03	478	24	454	2,884	170	2,715
%Change						
Jul-02	-1.0	1.4	-1.1	0.7	-0.5	0.7
Aug-02	-0.9	-0.5	-0.9	-0.8	-3.6	-0.6
Sep-02	0.1	1.4	0.0	0.9	6.8	0.5
Oct-02	1.0	-3.8	1.3	-0.6	-2.1	-0.5
Nov-02	5.3	4.5	5.4	0.3	0.0	0.3
Dec-02	-2.3	-2.2	-2.3	1.5	-0.3	1.6
Jan-03	0.4	-0.4	0.4	-2.4	-6.2	-2.2
Feb-03	-1.1	0.2	-1.1	0.4	1.6	0.3
Mar-03	-0.5	-4.1	-0.3	0.1	-0.2	0.2
Apr-03	1.0	6.1	0.7	-1.8	0.2	-1.9
May-03	0.0	-3.9	0.2	2.0	-3.1	2.4
Jun-03	0.0	1.5	-0.1	0.1	1.3	0.0
Jul-03	5.1	1.0	5.4	0.5	3.8	0.3
Aug-03	2.3	-1.3	2.5	1.0	-4.1	1.3
Sep-03	0.3	-5.5	0.6	0.3	-3.6	0.5
Oct-03	1.5	-3.0	1.7	1.3	0.5	1.4
Nov-03	1.6	2.7	1.5	0.7	0.8	0.7
Dec-03	-0.2	6.5	-0.5	-0.1	-0.5	-0.1

[1]Source: Statistics Canada
Note: with the change to NAICS (North American Industry Classification System) coding, many of the series are not available prior to January 1999.

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below $20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Visit BC STATS on the World Wide Web at www.bcstats.gov.bc.ca

BRITISH COLUMBIA

BC STATS

Ministry of
Management Services

Tourism Sector Monitor ◆ March 2004

Highlights

Room Revenue

Room revenues in BC rose 3.2% (seasonally adjusted) in December, finishing the year on a solid note of growth. Every region in the province saw revenues increase, especially in Northeast (+10.6%), Kootenay (+9.0%), and Thompson Okanagan (+8.0%). Driving the growth was revenues at large hotels (+5.2%) and motels (+5.8%). A miscellaneous category of other accommodation types increased sharply in December (+11.9%)

Room revenues post third monthly increase in December

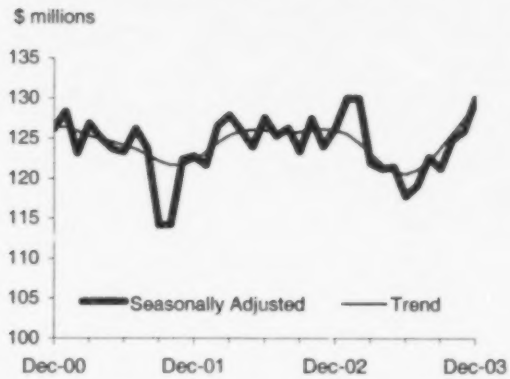


Table 1. Room Revenue* Summary

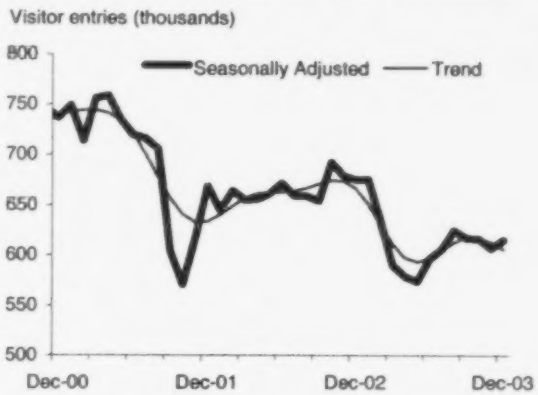
Accommodation Type			
	Dec 03 ($000)	Nov.03 ($000)	% change
Total	129,964	125,894	+3.2
Hotels	94,965	92,758	+2.4
Motels	16,264	15,377	+5.8
Other Acc.	19,235	18,049	+6.6
Regions (Top 3 performers)			
Northeast	4,235	3,830	+10.6
Kootenay	6,466	5,931	+9.0
Thompson Okanagan	19,324	17,889	+8.0

**Seasonally adjusted room revenue*

Visitor Entries

The volume of travellers entering Canada via BC borders edged upward marginally in December (+0.6% seasonally adjusted). Entries from both the US (+0.5%) and overseas (+0.9%) increased slightly. Asian visitor entries were essentially unchanged (-0.1%), owing in part to a significant drop in entries from Taiwan (-9.9%).

Visitor entries inch up in December



Other Indicators

Average hotel occupancy was up (+1.8 percentage points) in December, compared to the same month in the year before. Hotel room rates remained below the previous year's prices (-1.4%) for the tenth consecutive month in 2003.

Passenger vehicle traffic over the Coquihalla highway dropped (-8.8%) in December, compared to the same month of 2002. BC restaurant and tavern receipts held ground in December (+0.5%, seasonally adjusted).

Note to readers...

Special Focus Article: *BC Ferries—There and Back Again.* Page 7.

Tourism Trends

Room Revenue

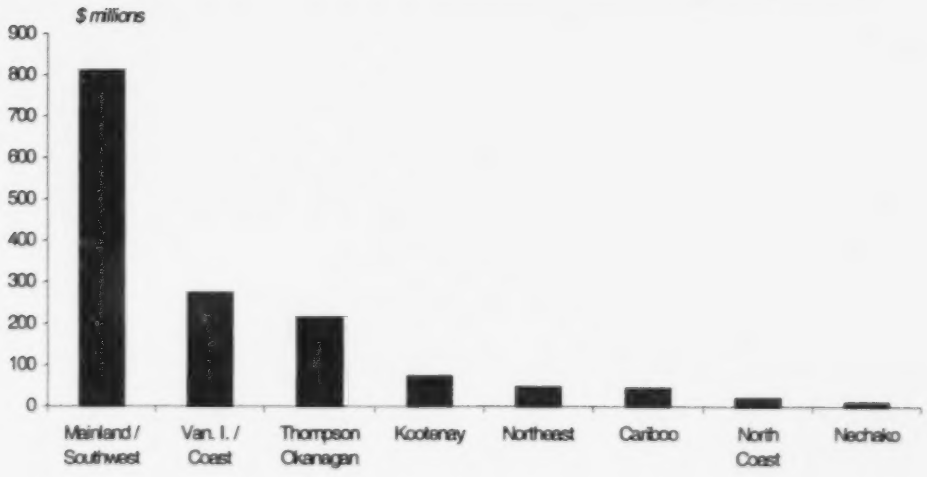
Room revenues in the province posted a 3.2% gain (seasonally adjusted) in December. More room revenues were seen in all the development regions. Northeast (+10.6%), Kootenay (+9.0%), and Thompson Okanagan (+8.0%) experienced stronger growth, while Mainland/Southwest (+1.7%) and Vancouver Island/Coast (+1.2%) posted modest gains.

All major regions of BC saw higher room revenues in December.

In 2003, room revenues in BC amounted to $1.48 billion, 1.3% lower than the room revenues in 2002. Mainland/Southwest lost ground in 2003 (-4.7%), and was the source of the overall decline in BC. Thompson Okanagan, despite disruption from the summer forest fires, was up 3.8%. Annual room revenues were also higher in Vancouver Island/Coast (+1.7%), North Coast (+1.8%), and Northeast (+21.3%). However, these gains only offset half of the loss in Mainland/Southwest.

The Mainland/Southwest region—Greater Vancouver and its surrounding areas such as Whistler—generated $810 million in accommodation revenues in 2003, 55% of the provincial total. Vancouver Island/Coast, with $273 million in room revenues, made up 18% of total revenues. Thompson Okanagan is the other major tourism region, posting $213 million (14%). The other five regions—the sparsely populated central and northern areas—together generated $189 million (13% of accommodation revenues). Indeed, some of BC's more remote regions, such as Nechako, contribute only about 1% of accommodation revenues.

Annual room revenues concentrated in Mainland/Southwest



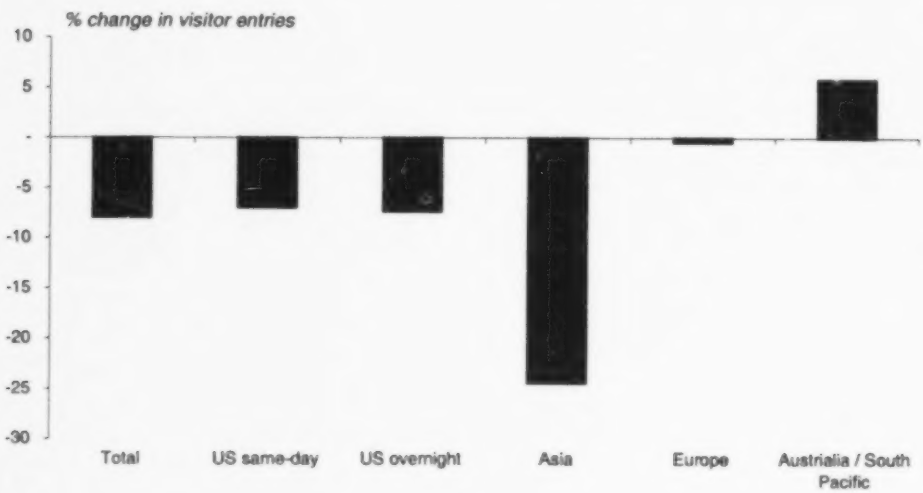
Visitor Entries

The volume of visitors entering Canada through BC edged up 0.6% (seasonally adjusted) in December 2003, after three consecutive monthly losses. Both US (+0.5%) and overseas (+0.9%) entries rebounded in December.

For the year as a whole, visitor entries continued to decline in 2003 (-5.9%), posting the third annual loss since 2001. The largest decline was in the Asian market (-24.4%), following the effect of the SARS panic. The US same-day (-6.4%) and overnight (-7.3%) traffic also slumped in 2003.

Visitor entries from Asia declined sharply in 2003.

Visitor Entries Down from Almost all Regions



The number of Canadians re-entering the country via BC decreased 0.8% in December. The number of Canadians returning to BC from overseas trips (-3.7%) and from same-day car trips to the US (-2.3%) both slumped for the first time since June 2003.

Table 2. Traveller Entries (*seasonally adjusted*)

	Dec-03 ('000)	Nov-03 ('000)	%chg from Nov-03
American visitors			
Total	507	504	0.5
Same-day	214	214	-0.1
Overnight	289	287	0.6
Overseas visitors			
Total	106	105	0.9
Europe	34	34	-0.6
UK	18	17	0.9
Asia	57	57	-0.1
Japan	20	20	1.0
Taiwan	6	7	-9.9
Oceania	11	10	4.2
Canadian re-entries			
Total	653	658	-0.8
From overseas	88	91	-3.7
From US same-day auto	338	345	-2.3

(BC STATS & Statistics Canada)

note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it is also includes other areas

Other Tourism Indicators

Hotel room prices continued to fall in December.

Hotel occupancy was 44.0% in December, 1.8 percentage points higher than in December 2002, while average room rates ($113.34) in BC were 1.4% lower than last year. This was the 10th straight month of falling room prices.

There were fewer vehicles (-12.3%) and passengers (-12.8%) on BC Ferries in December, compared with the same month of the year before. This was likely due in large part to the strike at BC Ferries early in the month.

Passenger vehicle traffic over the Coquihalla highway in December was 8.8% less than in the same month of the previous year. Restaurant and tavern receipts crept up (+0.5%, seasonally adjusted) in December.

Table 3. Other Tourism Indicators (unadjusted)

	Reference period	Total	Change from year ago
Hotel Industry			
Occupancy rate	Dec-03	44%	1.8 pp.
Average room charge *(Pannell Kerr Forster)*	Dec-03	$113.34	-1.4%
Airport Passengers		(000s)	(%)
Vancouver International Airport			
Total traffic	Dec-03	1,191	2.8
US	Dec-03	285	-1.5
Other International	Dec-03	279	3.4
Canada *(YVR)*	Dec-03	626	4.6
Victoria International Airport			
Total traffic *(Victoria Airport Authority)*	Dec-03	105	16.1
Restaurant Receipts		($ millions)	(%)
Full service	Dec-03	258	0.0
Limited service	Dec-03	160	0.0
Drinking places *(Statistics Canada)*	Dec-03	22	0.0
Transportation		(000s)	(%)
Coquihalla Highway			
Passenger Vehicles *(Ministry of Transportation & Highways)*	Dec-03	138	-8.8
BC Ferries			
Vehicle Volume	Dec-03	543	-12.3
Passenger Volume *(BC Ferries)*	Dec-03	1,371	-12.8
Exchange Rates		Cdn $	Change from year ago
US $	Dec-03	1.313	-0.246
UK Pound	Dec-03	2.299	-0.174
Japanese Yen	Dec-03	0.012	-0.001
Australian $ *(Statistics Canada)*	Dec-03	0.970	0.093

note: pp. percentage points

A look ahead

Room Revenue

Preliminary numbers for January point to a 2.1% drop (seasonally adjusted).

Following three consecutive gains in last quarter of 2003, preliminary numbers suggest that room revenues were down in **January** 2004 (-2.1% seasonally adjusted). All the regional districts experienced substantial losses, with the exception of Vancouver Island/Coast.

A caution about preliminary numbers

Because companies file their hotel room taxes with a varying lag, the initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a two-month lag. However, we also briefly report "preliminary data" with a one-month lag.

How accurate is the preliminary data? Over eight reports in 2003, room revenues changed (rose or fell on a month-over-month basis) on average by 3.2% (absolute value). Our preliminary numbers—reported in the "look ahead" box—were off by an average of 0.4 percentage points. The preliminary figures, in other words, seem basically on the mark, though they should be used with caution (a more detailed analysis of their accuracy will be undertaken in the future).

Visitor entries also took a downturn in January (-3.7%, seasonally adjusted). This was largely due to a significant drop in visitors from the US (-4.6%).

Other Tourism Indicators

Passenger vehicle traffic over the Coquihalla highway was 6.8% less than the same month of the previous year. The number of passengers (-4.8%) and (-4.6%) vehicles aboard BC Ferries both fell in January–relative to the same month of 2003. The Canadian dollar was strong relative to US currency in December. One Canadian dollar was priced at $0.77 US, compared to $0.65 in January 2003 (up 12 cents).

Special focus: BC Ferries—There and Back Again

In 1960, BC Ferries began as a two-ship, two-terminal operation. Today, with over 20 million passengers each year, BC Ferries is one of the largest ferry systems in the world, second only to Washington State Ferries. The ferry system is a major component of regional transportation in BC, serving residents, businesses, and tourists.

BC Ferries History[1]

Beginning around 1900, ferry service between Victoria and Vancouver was offered by a private company, Canadian Pacific Railway (CPR). By the 1950s, the CPR vessels were still miniature ocean liners, aged and poorly adapted for car service. Service was infrequent and the company rejected calls for more modern ships and better service, on the grounds that capital investments in the route would not be profitable.

Nanaimo actually had better ferry connections to Vancouver than did Victoria. There, two private operators offered service: CPR and Black Ball Ferries.

In 1958, a bitter strike at CPR shut down the Victoria—Vancouver service for two-and-a-half months, and the ferry from Nanaimo was the only water transportation link with the mainland. Canadian Pacific was under federal jurisdiction, and Ottawa was slow to react. More than two-weeks into the strike, the federal government mediator merely commented that it seemed the strike "will continue indefinitely".

In contrast to CPR, Black Ball Ferries operated under provincial jurisdiction. When workers at Black Ball served notice to strike in solidarity with workers at CPR, reaction from the provincial government was definitive. Premier W.A.C. Bennett, invoking the emergency Civil Defence Act, seized possession of Black Ball Ferries, appointed a new board of directors, and operated the route under direct provincial control. A month later, the union violated the Civil Defence Act and walked off the job—an attempt to force an end to the CPR strike.

The ensuring crisis—four days in which the Island was essentially cut off from the mainland—finally provoked action from the federal government, and the CPR strike came to a quick end.

At the same time, W.A.C. Bennett declared that "in the future, ferry connections between Vancouver Island and the mainland shall not be subject either to the whim of union policy nor to the indifference of federal agencies". The government announced it would build its own ferry system, and soon began construction of terminals at Tsawwassen and Swartz Bay. BC Ferries came on line in 1960, and in the next year the government bought out Black Ball Ferries' Nanaimo route.

Though precipitated by a major transportation crisis, BC Ferries was part of a broader program of "province-building". Under W.A.C. Bennett, the province took on massive public works programs, established crown corporations such as BC Rail and BC Hydro (an expropriation of a private company, BC Electric), and founded several universities (SFU, BCIT, and UVic). As in so many other areas, the Bennett government saw the ferry service as inadequate for the needs of the day, and set about to completely rebuild the system.

[1] This section is largely extracted from "W.A.C. Bennett and His Choice of State Enterprise: The 1958 Case of British Columbia Ferries," by Frank Leonard, 2002. University of Victoria. (Masters thesis, Department of History)

BC Ferries Today[2]

BC Ferries carried 21.3 million passengers and 8.3 million vehicles in 2002/03. About 51% of passenger traffic and 45% of vehicle trips were on the Vancouver Island—Mainland routes.

Since the late 1980s, the annual volume of passenger traffic has increased 27%. However, passenger traffic has lagged behind BC's population growth (+36% over the same period). There were 5.1 passenger trips per 1,000 population in 2003, down slightly from 5.5 in 1987.

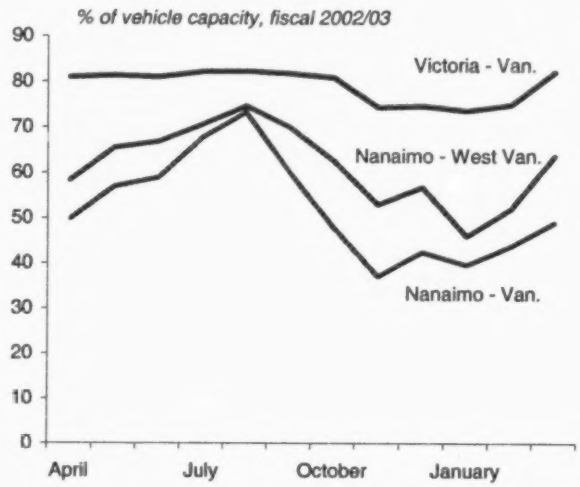
The BC ferry fleet, on average, runs at about 30% capacity for passengers and roughly 55% capacity for vehicles. Low rates of capacity utilization reflect seasonal patterns of ferry use. For example, in 2003, there were about one million vehicle trips in August. This was double the vehicle traffic in February. BC Ferries also adjusts its capacity—such as the number of sailings—to match seasonal demand. On the main Victoria—Vancouver route, capacity management is very precise. Vehicle capacity is held almost constant at 82% in the high season and 74% in the low season.

On the Nanaimo—West Vancouver route, in contrast, vehicle capacity fluctuates widely by month, from 46% in January to 75% in August. Thus, on this route, ferry service is more stable over the year, rather than being carefully matched to traffic volumes. Average capacity utilization over the year is about 62%, significantly lower than the Victoria-Vancouver route (79%).

On the inter-island runs (for example, service to the Gulf Islands) capacity utilization is even lower, averaging 42% of vehicle capacity.

[2] This section draws largely on data in the BC Ferries 2002/03 annual report.

On Some Routes, Capacity Utilization Fluctuates Widely



Data Source: BC Ferries

The ferry system has not, in general, been a net income earning operation. In four out of the last five years, BC Ferries has posted a net income loss. In 2002/03, there was a net loss of $29 million—roughly 5.5% of total expenditures. Of course, BC Ferries, unlike the BC Lottery Corporation or the Liquor Distribution Branch, has never had a strong mandate to earn revenues for the government. Affordable, frequent service provision has generally been a higher priority than commercial profitability.

In recent years there has been an expansion of food services, most prominently in partnerships with the White Spot restaurants, Starbucks Coffee, and Villages Pizza. Over the last three years, food and beverage sales per passenger have increased 10%, suggesting customer approval.

Another recent policy change has been the introduction of the reservation system. In the system's first year, 1998, only 3% of vehicle trips opted for the $15 reservation. By 2003, 17% of vehicles boarded with a reservation, generating over $7 million in additional revenues. The use of reservations

varies widely by season, from only 9% in the winter months to 20% in the summer. With this many vehicles reserving space, particularly in the summer, it may be increasingly difficult to board a ferry without a reservation.

Finally, a lingering problem at BC Ferries is scheduling. In 2002/03, only 75% of mainland sailings were "on time" (within 10 minutes of schedule).

Vancouver Island—Mainland Routes: A Price Analysis

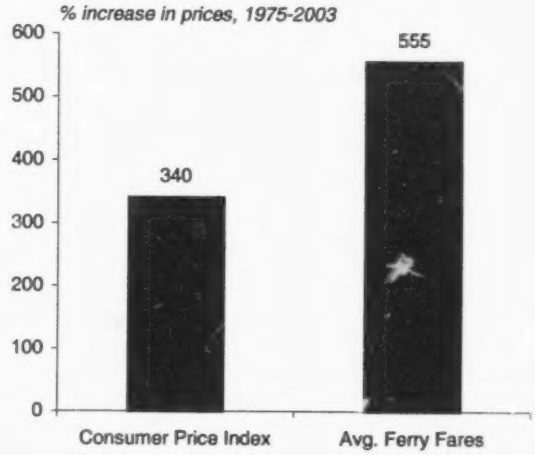
BC Stats has constructed a weighted average ferry fare that includes prices for adults, children, seniors, discounted fares (low season and discounted weekdays), vehicle prices (cars and motorcycles), and reservation fees. These various prices are weighted by their frequency in BC Ferries traffic. The average price covers fares for the Vancouver Island—Mainland routes.

Average fares on the Vancouver Island—Mainland routes have increased steeply over the years, well above the rate of inflation. Since 1975, the Vancouver consumer price index has increased 340%. Average ferry fares over the same period have risen 555%.

For example, in 1975, the car price was $5, or roughly $17 in constant 2003 dollars (adjusting for inflation). Last year, the average fare for a car was $30—a real increase of $13 (+77%).

The real (inflation adjusted) weighted average price of taking a ferry trip has risen from $9 in 1975 to nearly $15 in 2003 (+63%).

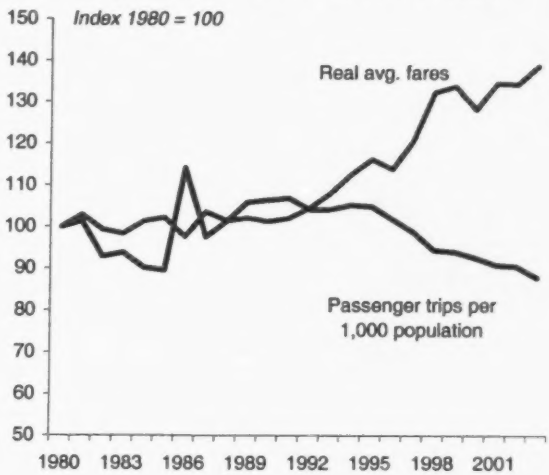
Ferry Fare Increases Higher than Vancouver Inflation



Data Source: BC Stats and BC Ferries

In spite of rising ferry fares, the volume of passengers aboard BC Ferries rose 33% between 1980 and 2003. However, the BC population increased by 55% over the same period. On the Vancouver Island—Mainland routes, the number of passenger trips per 1,000 population has fallen from 3.0 in 1980 to 2.6 in 2003 (-12%). Similarly, the number of vehicle trips per 10,000 population was 8.9 last year, down from 10.1 in 1980 (-12%).

Passenger Trips Fall as Fares Increase



Data Source: BC Stats and BC Ferries

A simple correlation analysis suggests that real (inflation adjusted) average fares explain 51% of the trend in passenger trips per 1,000 population[3].

However, with 49% of the variation in passenger trips per 1,000 population unexplained, it is clear that a considerable portion of BC Ferries traffic is not very price sensitive. These passengers are likely businesses and Vancouver Island residents that have few alternatives to using the ferry system. Tourism-related ferry traffic is likely to be more sensitive to changes in prices.

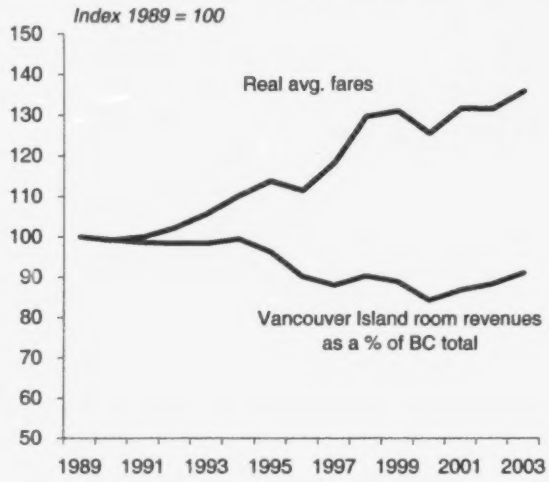
Indeed, it seems that rising ferry prices have adversely affected tourism to Vancouver Island. The Island's share of provincial tourism—as measured by accommodation room revenues—is in decline. The share of total room revenues has fallen from 20.2% in 1989 to 18.4% in 2003—a drop of 1.8 percentage points. This represents about $30 million in room revenues.

The trend in Vancouver Island's share of room revenues has closely followed changes in ferry prices. This suggests that BC Ferries has been, to a degree, pricing Vancouver Island out of the tourism market. A simple correlation analysis indicates that real average ferry prices "explain" some 84% of the change in Vancouver Island's share of room revenues.

As a rough estimate, one can suggest that the rising ferry rates since 1989 are associated with about $26 million in lost room revenues on the Island in 2003 alone. To the extent that Vancouver Island is a destination for visitors outside of the province, it is likely that the BC tourism sector as a whole has been effected.

3 BC Ferries, in its last annual report, pointed out that "large multiple tariff increases in 1997" were a significant factor in declining passenger volumes in the late 1990s.

Vancouver Island's share of room revenues falls as ferry prices rise



Data Source: BC Stats and BC Ferries

BC Ferries Outlook

In 2003, BC Ferries was reorganized as a private sector corporation. At the same time, the BC Ferry Authority was established as sole owner of the new company. The provincial government appoints the directors of the Ferry Authority, and private investment in BC Ferries is not permitted.

As well, the company is regulated by the new BC Ferry Commission, which has authority over ferry fares, routes, service levels, and capital spending.

The BC Ferry Commission describes the arrangement as an "effective monopoly" that is "publicly owned but private-functioning"[4] Further, virtually all significant business decisions are subject to regulatory approval.

Thus, the re-organization at BC Ferries has not dramatically changed the nature of the company. However, there is a new mandate

4 http://www.bcferrycommission.com/about_bc_ferries.html. Retrieved March 22, 2004.

to operate as a commercial enterprise—with, perhaps, a greater degree of separation from the government.

Revenues

Passenger and vehicle fares in 2002/03 contributed 64% of total BC Ferries revenue. Last fiscal year, BC Ferries received $23.4 million in subsidies from the federal government and $74.2 million from the province. These payments represented 20% of total BC Ferries revenues. The provincial subsidy, according the BC Ferries annual report, is expected to rise to $105.5 million in 2003/04.

However, under legislation, the long-term plan is for the ferry service to "move towards a greater reliance on a user pay system so as to reduce, over time, the service fee contributions by the government" (Coastal Ferry Act, Section 38).

Capital Costs

BC Ferries has an ageing fleet. The average age of vessels is 30 years old, and the ships have an expected operational life span of 40 years.

In 1994, the average age of the fleet was 24 years, and the goal at that time was to bring the average age down through vessel replacement. The ill-fated fast ferries project, which was not recommended by BC Ferries, was a major part of the plan for fleet renewal. The auditor general's conclusion was that, in the end, the fast ferry project had "adversely affected BC Ferries' ability to renew its fleet" [5].

BC Ferries is currently planning to spend $1.8 billion over the next 12 years on an asset replacement program[6]. Thus, capital expenditure requirements may create pressure for further real price increases in the future.

Conclusion

BC Ferries is facing pressures to move closer to a fully user-pay system and at the same time upgrade its fleet. The pattern of rising ferry fares is likely to continue into the foreseeable future, which could slow future tourism growth on Vancouver Island.

[5] Auditor General. *A Review of the Fast Ferry Project: Governance and Risk Management.* 1999/2000 Report 5. Office of the Auditor General of British Columbia.

[6] British Columbia Ferry Corporation. *2002/03 Annual Report.* BC Ferries.

Table 1: Seasonally Adjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,927	810,366	213,312	72,084	43,064	19,364	8,924	45,992	1,486,034
Quarterly data									
2002 Q4	67,320	213,259	52,338	17,480	11,063	4,502	2,348	9,398	377,709
2003 Q1	68,720	210,114	55,296	18,839	10,327	4,837	2,346	11,369	381,848
2003 Q2	66,713	194,979	52,299	17,578	10,815	4,709	2,193	11,171	360,457
2003 Q3	66,865	199,050	50,794	17,153	10,582	4,830	2,184	11,558	363,016
2003 Q4	70,629	206,223	54,923	18,514	11,339	4,988	2,201	11,895	380,712
Monthly data									
Jul-02	22,099	71,546	17,264	5,769	3,530	1,608	711	2,773	125,300
Aug-02	22,345	71,169	17,374	6,237	3,808	1,633	701	2,990	126,256
Sep-02	21,726	68,784	17,072	6,023	3,784	1,648	748	3,555	123,340
Oct-02	22,243	72,137	17,617	5,759	3,761	1,539	836	3,557	127,450
Nov-02	22,059	69,607	17,257	5,850	3,727	1,573	772	3,170	124,015
Dec-02	23,019	71,515	17,463	5,870	3,575	1,390	740	2,671	126,245
Jan-03	22,745	71,881	19,961	6,131	3,521	1,589	743	3,386	129,978
Feb-03	23,307	73,073	17,832	6,546	3,176	1,564	861	3,580	129,938
Mar-03	22,668	65,161	17,483	6,161	3,630	1,684	743	4,403	121,933
Apr-03	22,696	65,173	17,479	6,003	3,595	1,619	730	3,928	121,223
May-03	22,160	66,596	17,336	5,780	3,583	1,528	747	3,713	121,442
Jun-03	21,857	63,210	17,485	5,795	3,637	1,562	716	3,529	117,792
Jul-03	21,923	64,603	16,993	5,887	3,528	1,583	727	3,879	119,123
Aug-03	22,496	67,508	17,092	5,673	3,551	1,637	728	3,948	122,633
Sep-03	22,446	66,938	16,709	5,594	3,503	1,610	730	3,730	121,261
Oct-03	23,370	67,650	17,709	6,118	3,808	1,608	760	3,830	124,854
Nov-03	23,484	68,693	17,889	5,931	3,713	1,638	716	3,830	125,894
Dec-03	23,774	69,880	19,324	6,466	3,818	1,742	725	4,235	129,964
Month-over-month growth rates									
Jul-02	-1.9	-2.8	4.7	-4.0	-3.5	2.3	-2.8	-5.6	-1.8
Aug-02	1.1	-0.5	0.6	8.1	7.9	1.5	-1.5	7.8	0.8
Sep-02	-2.8	-3.4	-1.7	-3.4	-0.6	1.0	6.7	18.9	-2.3
Oct-02	2.4	4.9	3.2	-4.4	-0.6	-6.6	11.8	0.0	3.3
Nov-02	-0.8	-3.5	-2.0	1.6	-0.9	2.2	-7.7	-10.9	-2.7
Dec-02	4.4	2.7	1.2	0.3	-4.1	-11.6	-4.1	-15.7	1.8
Jan-03	-1.2	0.5	14.4	4.4	-1.5	14.3	0.4	26.8	3.0
Feb-03	2.5	1.7	-10.8	6.8	-9.8	-1.5	15.8	5.7	0.0
Mar-03	-2.7	-10.8	-2.0	-5.9	14.3	7.7	-13.7	23.0	-6.2
Apr-03	0.1	0.0	0.0	-2.6	-1.0	-3.9	-1.7	-10.8	-0.6
May-03	-2.4	2.2	-0.8	-3.7	-0.3	-5.6	2.3	-5.5	0.2
Jun-03	-1.4	-5.1	0.9	0.3	1.5	2.2	-4.2	-4.9	-3.0
Jul-03	0.3	2.2	-2.8	1.6	-3.0	1.3	1.5	9.9	1.1
Aug-03	2.6	4.5	0.6	-3.6	0.6	3.5	0.1	1.8	2.9
Sep-03	-0.2	-0.8	-2.2	-1.4	-1.3	-1.7	0.3	-5.5	-1.1
Oct-03	4.1	1.1	6.0	9.4	8.7	-0.1	4.2	2.7	3.0
Nov-03	0.5	1.5	1.0	-3.1	-2.5	1.8	-5.8	0.0	0.8
Dec-03	1.2	1.7	8.0	9.0	2.8	6.3	1.2	10.6	3.2

December month-over-month percent growth

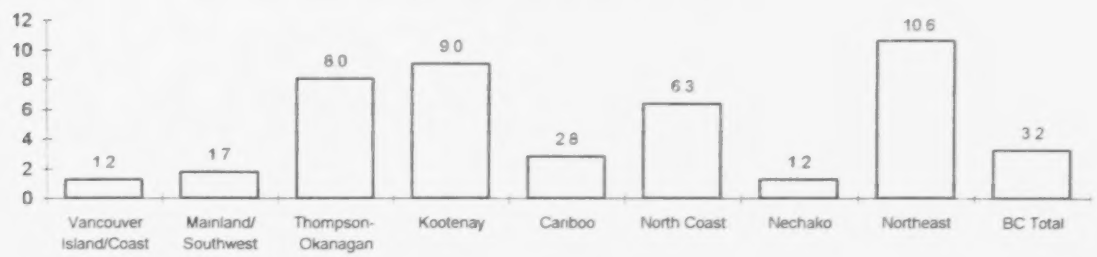


Table 2: Seasonally Adjusted Room Revenue by Accommodation Type ($000)

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,488	174,225	181,021	119,296	95,282
Quarterly data							
2002 Q4	117,135	46,440	74,044	43,693	44,908	29,039	22,837
2003 Q1	115,522	46,044	74,775	44,149	45,682	29,925	24,887
2003 Q2	103,862	43,481	72,619	43,171	44,714	29,575	22,691
2003 Q3	106,121	43,958	73,548	42,913	43,186	29,117	23,182
2003 Q4	112,387	47,347	76,546	43,992	47,439	30,679	24,521
Monthly data							
Jul-02	39,137	15,848	24,802	14,793	15,131	8,881	6,942
Aug-02	38,514	15,947	24,718	14,970	15,465	9,289	7,365
Sep-02	38,595	14,772	24,784	14,382	14,772	9,667	7,036
Oct-02	40,749	15,442	24,629	14,722	15,306	10,468	7,568
Nov-02	36,757	15,160	24,384	14,914	14,782	9,183	7,744
Dec-02	39,629	15,838	25,031	14,057	14,820	9,388	7,525
Jan-03	40,440	15,685	25,579	15,039	15,064	9,968	8,064
Feb-03	40,405	15,581	25,041	14,863	15,460	10,020	8,612
Mar-03	34,678	14,779	24,155	14,247	15,159	9,937	8,210
Apr-03	35,137	14,854	24,411	14,400	15,108	9,761	7,439
May-03	35,337	14,506	24,040	14,595	14,685	10,035	7,622
Jun-03	33,387	14,121	24,168	14,176	14,922	9,780	7,630
Jul-03	33,754	14,342	24,127	14,227	14,594	9,823	7,667
Aug-03	36,772	14,953	24,770	14,575	14,658	9,829	7,641
Sep-03	35,594	14,664	24,651	14,110	13,934	9,465	7,874
Oct-03	36,670	15,501	25,492	14,885	15,797	9,889	8,026
Nov-03	36,904	15,745	25,657	14,452	15,377	10,265	7,785
Dec-03	38,813	16,101	25,397	14,655	16,264	10,525	8,710
Month-over-month growth rates							
Jul-02	-3.3	-1.9	0.3	-0.9	-0.1	-0.9	-3.8
Aug-02	-1.6	0.6	-0.3	1.2	2.2	4.6	6.1
Sep-02	0.2	-7.4	0.3	-3.9	-4.5	4.1	-4.5
Oct-02	5.6	4.5	-0.6	2.4	3.6	8.3	7.6
Nov-02	-9.8	-1.8	-1.0	1.3	-3.4	-12.3	2.3
Dec-02	7.8	4.5	2.7	-5.7	0.3	2.2	-2.8
Jan-03	2.0	-1.0	2.2	7.0	1.6	6.2	7.2
Feb-03	-0.1	-0.7	-2.1	-1.2	2.6	0.5	6.8
Mar-03	-14.2	-5.1	-3.5	-4.1	-1.9	-0.8	-4.7
Apr-03	1.3	0.5	1.1	1.1	-0.3	-1.8	-9.4
May-03	0.6	-2.3	-1.5	1.4	-2.8	2.8	2.5
Jun-03	-5.5	-2.7	0.5	-2.9	1.6	-2.5	0.1
Jul-03	1.1	1.6	-0.2	0.4	-2.2	0.4	0.5
Aug-03	8.9	4.3	2.7	2.4	0.4	0.1	-0.3
Sep-03	-3.2	-1.9	-0.5	-3.2	-4.9	-3.7	3.0
Oct-03	3.0	5.7	3.4	5.5	13.4	4.5	1.9
Nov-03	0.6	1.6	0.6	-2.9	-2.7	3.8	-3.0
Dec-03	5.2	2.3	-1.0	1.4	5.8	2.5	11.9

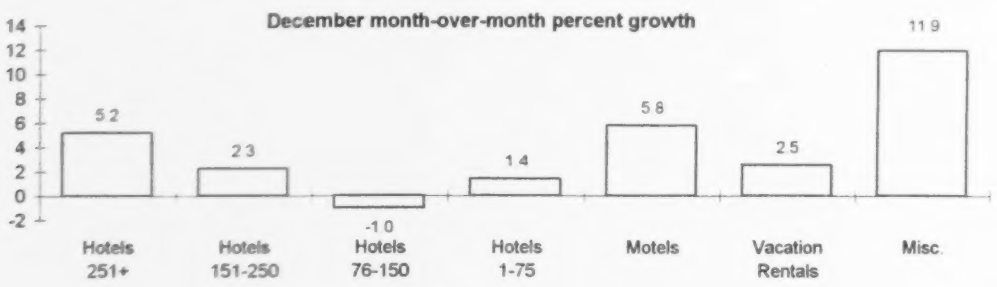


Table 3: Unadjusted Room Revenue by Development Region

Development Region	Revenue				Properties		Rooms	
	($000)		% chg from		(#)	# chg from	(#)	# chg from
	Dec-03	YTD 03	Dec-02	YTD 02	Dec-03	Dec-02	Dec-03	Dec-02
Vancouver Island/Coast								
Total - all accommodation types	**11,758**	**272,927**	**4.6**	**1.7**	**401**	**16**	**15,203**	**488**
Total - Hotels	7,152	169,897	-0.4	-1.3	134	0	8,722	60
76+ Rooms	4,732	114,587	-0.8	-1.9	40	1	5,223	84
1-75 Rooms	2,419	55,310	0.2	0.0	94	-1	3,499	-24
Motels	1,464	35,438	3.5	1.2	120	5	3,173	187
Vacation Rentals	1,660	32,049	19.7	10.5	75	4	1,429	124
Mainland/Southwest								
Total - all accommodation types	**59,267**	**810,366**	**-0.2**	**-4.7**	**416**	**13**	**35,865**	**238**
Total - Hotels	50,787	725,000	-0.2	-4.9	228	1	30,298	189
251+ Rooms	28,038	398,477	-0.9	-6.0	32	0	12,719	0
151-250 Rooms	7,422	118,024	2.2	-5.9	29	1	5,469	165
76-150 Rooms	11,201	153,607	-2.4	-2.8	77	0	8,172	49
1-75 Rooms	4,127	54,893	6.0	-1.0	90	0	3,938	-25
Motels	1,450	27,097	-1.7	-6.3	88	-4	2,824	-145
Vacation Rentals	5,340	37,359	1.7	-5.5	58	8	1,980	117
Thompson/Okanagan								
Total - all accommodation types	**11,649**	**213,312**	**12.7**	**3.8**	**426**	**16**	**16,419**	**559**
Total - Hotels	6,009	113,582	8.5	3.6	106	1	7,236	132
76+ Rooms	4,266	84,492	10.5	3.7	39	1	4,636	145
1-75 Rooms	1,742	29,089	3.8	3.1	67	0	2,600	-13
Motels	2,529	63,468	20.3	1.4	230	6	7,078	219
Vacation Rentals	2,615	22,096	16.7	9.9	41	4	1,150	79
Kootenay								
Total - all accommodation types	**5,010**	**72,084**	**13.3**	**0.5**	**208**	**5**	**6,455**	**121**
Total - Hotels	1,668	26,826	2.2	-1.7	47	-3	2,426	-8
Motels	796	18,448	2.7	-9.5	94	-1	1,945	-74
Vacation Rentals	1,168	11,568	24.2	8.6	34	2	983	33
Cariboo								
Total - all accommodation types	**2,199**	**43,064**	**6.6**	**-3.3**	**121**	**1**	**4,185**	**-47**
Total - Hotels	1,158	23,206	-2.2	-4.5	28	1	1,855	-39
Motels	795	15,295	10.7	-2.8	64	-2	2,004	-36
North Coast								
Total - all accommodation types	**831**	**19,364**	**27.1**	**1.8**	**55**	**2**	**1,699**	**62**
Total - Hotels	461	9,441	28.3	1.4	17	1	892	40
Motels	246	5,092	9.8	-2.4	26	-1	705	8
Nechako								
Total - all accommodation types	**449**	**8,924**	**1.8**	**0.9**	**40**	**-3**	**1,075**	**-92**
Motels	254	5,055	4.9	7.5	25	0	651	-5
Northeast								
Total - all accommodation types	**3,538**	**45,992**	**59.0**	**21.3**	**70**	**9**	**3,008**	**508**
Total - Hotels	1,742	20,030	56.1	16.6	21	3	1,502	201
Motels	782	11,129	42.2	20.7	33	1	934	22
British Columbia Total								
Total - all accommodation types	**94,700**	**1,486,034**	**4.4**	**-1.3**	**1,737**	**59**	**83,909**	**1,837**
Fishing lodges	246	18,373	38.3	5.1	25	4	392	46
Total - Hotels	69,085	1,090,436	1.5	-3.1	588	2	53,255	493
251+ Rooms	29,675	437,892	-0.9	-5.9	35	0	13,823	0
151-250 Rooms	10,436	180,831	2.8	-4.0	44	1	8,205	165
76-150 Rooms	18,790	297,488	3.1	0.2	172	5	17,786	549
1-75 Rooms	10,184	174,225	4.8	0.0	337	-4	13,441	-221
Motels	8,316	181,021	10.9	-0.4	680	4	19,314	176
Vacation Rentals	11,833	119,296	13.5	6.1	239	26	6,165	658
Miscellaneous	5,221	76,908	14.0	10.9	205	23	4,783	464

Table 4: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	($000)		% change from		(#)	# chg from	(#)	# chg from
	Dec-03	YTD 03	Dec-02	YTD 02	Dec-03	Dec-02	Dec-03	Dec-02
35 Central Okanagan								
Total - All accommodation types	3,581	65,048	21.0	1.0	60	0	3,666	143
Total - Hotels	2,158	42,782	14.8	0.5	21	-1	1,912	40
Motels	516	13,425	22.7	1.8	25	-1	1,117	-40
37 North Okanagan								
Total - All accommodation types	1,773	19,943	2.5	7.6	40	3	1,621	127
Total - Hotels	1,160	11,828	-2.7	-2.0	14	0	806	0
Motels	264	5,115	49.2	8.2	19	2	642	122
39 Columbia-Shuswap								
Total - All accommodation types	1,417	34,961	2.6	0.9	87	6	2,852	161
Total - Hotels	631	15,227	-4.9	-1.0	18	0	1,035	0
Motels	553	12,734	1.2	-1.4	45	0	1,490	0
Miscellaneous	155	3,349	24.2	8.8	18	5	270	156
Kootenay								
01 East Kootenay								
Total - All accommodation types	3,918	49,401	13.2	0.5	112	8	4,484	266
Total - Hotels	1,110	15,888	1.1	-1.8	26	0	1,562	68
Motels	483	10,547	1.9	-9.7	44	1	1,061	10
Vacation Rentals	1,031	9,734	20.6	2.9	20	1	869	28
03 Central Kootenay								
Total - All accommodation types	747	17,062	14.4	3.4	62	-1	1,311	-112
Total - Hotels	452	9,186	5.8	0.4	15	-2	643	-68
Motels	177	4,769	10.9	-6.8	28	-1	512	-58
Vacation Rentals	50	1,292	29.2	49.0	11	0	69	-2
05 Kootenay Boundary								
Total - All accommodation types	345	5,622	11.9	-7.3	34	-2	660	-33
Motels	137	3,133	-3.5	-12.5	22	-1	372	-26
Cariboo								
41 Cariboo								
Total - All accommodation types	870	16,854	14.4	0.1	71	1	1,716	-81
Motels	447	8,600	8.9	2.4	35	-2	1,026	-50
Vacation Rentals	72	1,311	6.1	8.2	17	3	132	20
53 Fraser-Fort George								
Total - All accommodation types	1,328	26,210	2.1	-5.3	50	0	2,469	34
Total - Hotels	955	18,574	-3.1	-4.6	18	0	1,392	0
Motels	348	6,695	13.2	-8.8	29	0	978	14
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	363	11,716	32.1	2.3	26	2	929	47
Motels	74	2,195	31.1	1.0	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	467	7,647	23.5	1.0	29	0	770	15
Motels	173	2,897	2.6	-4.7	15	-1	377	8
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	449	8,924	1.8	0.9	40	-3	1,075	-92
Motels	254	5,055	4.9	7.5	25	0	651	-5
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	3,538	45,992	59.0	21.3	70	9	3,008	508
Total - Hotels	1,742	20,030	56.1	16.6	21	3	1,502	201
Motels	782	11,129	42.2	20.7	33	1	934	22
Vacation Rentals	957	13,892	78.4	26.3	13	5	485	285

Table 5: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	($000)		% change from		(#)	# chg from	(#)	# chg from
	Dec-03	YTD 03	Dec-02	YTD 02	Dec-03	Dec-02	Dec-03	Dec-02
Vancouver Island/Coast	**11,758**	**272,927**	**4.6**	**1.7**	**401**	**16**	**15,203**	**488**
Victoria (C)	4,922	121,968	-2.5	-5.2	73	0	5,280	-18
Other CRD	1,180	32,073	3.4	4.1	73	6	2,545	278
Nanaimo (C)	1,073	18,427	6.7	3.0	23	1	1,234	9
Port Alberni (C)	148	3,451	-4.9	-0.5	12	-1	353	-37
Courtenay (C)	634	8,051	27.4	16.7	12	1	515	27
Rest of Development Regio	3,802	88,958	12.0	10.2	220	10	5,276	229
Mainland/Southwest	**59,267**	**810,366**	**-0.2**	**-4.7**	**416**	**13**	**35,865**	**238**
Downtown Vancouver (C)	16,336	367,351	-1.1	-5.4	82	1	12,873	52
Other Vancouver (C)	1,509	30,592	-5.1	-8.4	34	1	2,840	40
Richmond (C)	5,452	89,200	4.6	-2.2	23	1	4,321	70
Burnaby (C)	1,277	24,573	-1.6	-5.7	10	-11	1,183	296
Other GVRD	3,938	64,987	4.8	-3.3	81	3	4,568	66
Whistler (DM)	26,752	186,134	-3.9	-6.1	78	5	6,668	41
Rest of Development Regio	4,003	47,530	26.8	3.3	108	13	3,412	-327
Thompson/Okanagan	**11,649**	**213,312**	**12.7**	**3.8**	**426**	**16**	**16,419**	**559**
Penticton (C)	742	21,917	15.1	5.7	42	1	1,793	24
Kamloops (C)	3,144	41,533	13.0	10.7	65	0	3,598	85
Kelowna (C)	3,361	58,248	19.1	1.7	51	0	3,105	5
Vernon (C)	1,747	18,662	2.0	10.1	33	2	1,510	122
Revelstoke (C)	593	13,227	24.3	3.7	26	5	1,030	143
Rest of Development Regio	2,063	59,727	8.6	-0.7	209	8	5,383	180
Kootenay	**5,010**	**72,084**	**13.3**	**0.5**	**208**	**5**	**6,455**	**121**
Cranbrook (C)	367	7,917	5.6	-5.5	19	-1	892	-29
Rest of Development Regio	4,624	64,168	14.0	1.3	189	6	5,563	150
Cariboo	**2,199**	**43,064**	**6.6**	**-3.3**	**121**	**1**	**4,185**	**-47**
Quesnel (C)	193	3,483	14.4	5.6	13	1	452	7
Williams Lake (C)	214	4,526	3.5	-1.6	11	0	534	-34
Prince George (C)	1,029	19,857	0.4	-4.9	28	0	1,708	14
Rest of Development Regio	762	15,199	15.1	-3.5	69	0	1,491	-34
North Coast	**831**	**19,364**	**27.1**	**1.8**	**55**	**2**	**1,699**	**62**
Prince Rupert (C)	330	6,886	40.8	0.6	15	1	761	40
Rest of Development Regio	243	8,179	15.0	5.1	31	2	575	55
Nechako	**449**	**8,924**	**1.8**	**0.9**	**40**	**-3**	**1,075**	**-92**
Smithers (T)	177	4,108	-6.2	-3.9	12	-1	400	-17
Rest of Development Regio	271	4,816	7.8	5.4	28	-2	675	258
Northeast	**3,538**	**45,992**	**59.0**	**21.3**	**70**	**9**	**3,008**	**508**
Dawson Creek (C)	352	5,899	21.4	20.5	15	0	499	0
Fort St. John (C)	1,338	19,028	31.9	6.4	20	2	1,105	113
Rest of Development Regio	1,848	21,066	100.8	39.3	35	7	1,404	395

Table 6: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,927	810,366	213,312	72,084	43,064	19,364	8,924	45,992	1,486,034
Quarterly data									
2002 Q4	41,750	156,673	31,188	10,869	8,420	2,666	2,056	7,911	261,533
2003 Q1	39,094	208,010	40,408	20,482	7,500	2,819	1,579	15,935	335,826
2003 Q2	71,691	189,501	49,634	14,641	11,457	5,056	2,104	8,831	352,915
2003 Q3	117,734	259,899	89,796	25,224	15,512	8,549	3,291	11,276	531,281
2004 Q3	44,409	152,955	33,474	11,738	8,595	2,941	1,950	9,951	266,013
Monthly data									
Jul-02	39,602	95,896	32,324	8,388	5,194	3,094	1,054	2,724	188,277
Aug-02	45,865	105,008	37,405	10,938	5,967	3,024	1,105	3,035	212,347
Sep-02	30,699	75,418	20,960	7,203	5,157	2,353	1,103	3,384	146,278
Oct-02	18,599	55,507	13,381	3,962	3,723	1,147	1,030	3,187	100,536
Nov-02	11,910	41,802	7,472	2,484	2,635	865	586	2,499	70,252
Dec-02	11,241	59,364	10,335	4,423	2,063	654	441	2,225	90,745
Jan-03	9,564	62,257	12,122	5,439	2,250	732	442	4,008	96,814
Feb-03	12,874	72,408	13,523	7,301	2,260	966	534	5,071	114,937
Mar-03	16,656	73,344	14,763	7,743	2,990	1,120	603	6,855	124,075
Apr-03	18,409	55,669	11,893	4,344	3,192	1,006	510	3,493	98,516
May-03	24,458	64,094	16,335	4,667	3,780	1,441	666	2,452	117,893
Jun-03	28,824	69,739	21,406	5,630	4,485	2,608	928	2,885	136,505
Jul-03	39,336	86,148	32,819	8,643	5,169	3,103	1,058	3,762	180,039
Aug-03	46,994	101,199	36,958	9,969	5,569	3,107	1,142	3,978	208,916
Sep-03	31,403	72,552	20,018	6,613	4,774	2,338	1,091	3,536	142,325
Oct-03	19,904	52,270	13,787	4,244	3,775	1,207	963	3,450	99,599
Nov-03	12,747	41,418	8,037	2,484	2,622	903	538	2,964	71,714
Dec-03	11,758	59,267	11,649	5,010	2,199	831	449	3,538	94,700
Year-over-year percent changes									
Jul-02	0.0	-4.0	5.8	2.2	-3.2	-4.5	-9.3	-8.3	-1.4
Aug-02	2.6	0.9	9.2	13.7	6.8	2.3	-9.9	-4.0	3.3
Sep-02	7.4	4.5	3.4	3.1	4.6	4.5	7.7	13.5	5.1
Oct-02	5.5	16.1	15.7	1.3	8.5	-9.0	15.6	9.2	12.4
Nov-02	2.0	0.1	6.0	-6.1	3.8	-0.2	6.5	-6.2	0.7
Dec-02	5.5	7.7	5.4	1.6	-3.1	-1.4	1.4	-18.5	5.7
Jan-03	6.6	10.5	16.1	4.4	-11.1	1.6	7.1	-0.3	9.2
Feb-03	3.3	5.6	8.8	8.8	-18.1	-3.2	24.2	3.9	5.2
Mar-03	0.5	-8.6	3.9	3.0	-0.6	3.4	-6.8	61.2	-2.7
Apr-03	2.2	-11.6	9.2	2.2	5.8	6.8	3.6	5.2	-5.2
May-03	-1.1	-4.1	6.3	-3.0	-4.0	-6.1	9.4	28.6	-1.5
Jun-03	-3.2	-15.3	6.0	-3.2	-0.8	0.3	-0.6	16.8	-8.2
Jul-03	-0.7	-10.2	1.5	3.0	-0.5	0.3	0.4	38.1	-4.4
Aug-03	2.5	-3.6	-1.2	-8.9	-6.7	2.7	3.3	31.1	-1.6
Sep-03	2.3	-3.8	-4.5	-8.2	-7.4	-0.6	-1.1	4.5	-2.7
Oct-03	7.0	-5.8	3.0	7.1	1.4	5.2	-6.5	8.2	-0.9
Nov-03	7.0	-0.9	7.6	0.0	-0.5	4.4	-8.1	18.6	2.1
Dec-03	4.6	-0.2	12.7	13.3	6.6	27.1	1.8	59.0	4.4

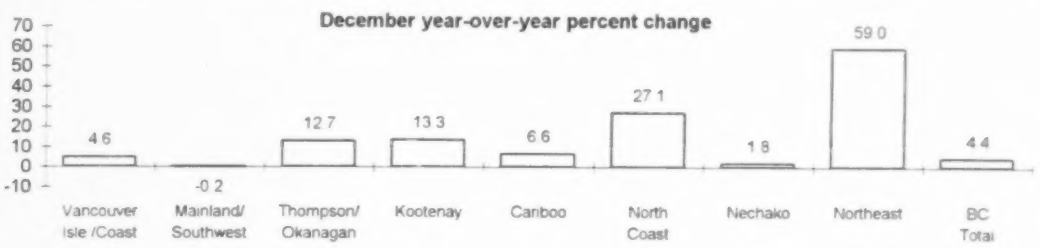


Table 7: Traveller Entries to Canada via BC, Unadjusted (000s)

Period	International								Canadian		
	Total	USA			Overseas				Total	USA same-day auto	Overseas
		Total	Same-day	Overnight	Total	Asia	Europe	Oceania*			
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0	9,588.1	5,813.1	798.4
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8	9,435.2	5,639.0	866.4
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9	8,328.6	4,720.3	902.8
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0	7,197.3	3,586.8	927.5
2003	7,335.3	6,137.4	2,642.1	3,495.4	1,197.8	577.6	410.1	124.8	7,285.2	3,744.3	941.8
Quarterly data											
2002 Q4	1,462.4	1,211.8	582.3	629.6	250.6	149.3	63.4	24.4	1,576.4	827.8	208.1
2003 Q1	1,330.4	1,115.7	520.0	595.7	214.7	116.6	63.4	24.3	1,608.4	779.3	299.6
2003 Q2	1,843.4	1,561.8	698.1	863.7	281.6	110.0	114.1	35.8	1,730.4	921.6	177.8
2003 Q3	2,833.6	2,361.5	902.5	1,458.9	472.1	217.4	173.0	41.7	2,309.5	1,170.6	227.4
2003 Q4	1,327.9	1,098.5	521.4	577.1	229.4	133.4	59.6	23.0	1,636.9	872.7	237.0
Monthly data											
Aug-02	1,163.6	980.0	340.3	639.8	183.5	96.4	61.1	13.2	831.0	392.1	88.4
Sep-02	745.9	595.2	264.7	330.5	150.7	63.6	22.8	6.2	560.5	290.9	63.4
Oct-02	503.3	406.6	194.7	212.0	96.7	63.6	16.4	5.7	506.8	270.2	67.6
Nov-02	438.9	373.6	196.5	177.1	65.3	40.2	16.4	5.7	509.0	266.7	77.1
Dec-02	520.2	431.6	191.1	240.5	88.6	45.4	24.2	12.4	535.2	255.8	110.4
Jan-03	437.5	364.6	182.1	182.5	72.9	39.1	17.9	11.8	483.5	246.3	83.3
Feb-03	444.1	377.0	166.9	210.1	67.1	35.0	22.1	6.9	589.7	277.2	105.9
Mar-03	448.8	374.1	171.0	203.1	74.6	42.5	23.3	5.6	516.7	267.6	67.6
Apr-03	448.3	378.5	183.4	195.1	69.9	31.9	25.0	6.1	602.1	318.3	57.1
May-03	611.3	521.4	239.8	281.6	89.9	31.1	38.7	14.4	611.6	335.7	53.1
Jun-03	783.8	661.9	274.9	387.0	121.9	47.0	50.4	15.2	772.3	398.5	64.2
Jul-03	1,024.8	861.4	313.1	548.3	163.4	71.0	61.4	13.2	903.9	446.4	95.2
Aug-03	1,118.8	947.5	339.6	607.9	171.2	81.7	62.8	13.7	633.3	325.7	68.1
Sep-03	690.0	552.5	249.9	302.7	137.5	64.8	48.9	14.9	560.6	302.6	71.2
Oct-03	454.2	371.7	179.8	191.9	82.5	52.0	21.9	5.5	548.0	293.3	78.4
Nov-03	393.2	333.5	173.4	160.1	59.7	36.4	14.4	5.3	528.4	276.9	87.0
Dec-03	480.5	393.3	168.3	225.0	87.2	45.0	23.2	12.3	536.6	260.1	112.0
Jan-04	387.0	314.2	152.9	161.4	72.8	40.0	16.8	11.6			
Year-over-year percent changes											
Aug-02	-5.2	-4.4	-19.7	6.4	-9.3	-2.4	-17.9	-3.1	-20.0	-34.3	1.3
Sep-02	5.8	6.4	2.6	9.6	3.7	17.8	-10.9	-7.4	7.6	2.8	0.7
Oct-02	23.4	22.6	25.5	20.0	26.8	48.7	-4.4	0.1	21.2	34.5	5.2
Nov-02	12.5	11.0	15.9	5.9	22.1	30.9	7.6	19.5	16.8	24.5	10.9
Dec-02	2.2	2.4	5.3	0.2	1.1	-3.1	-0.6	17.4	9.6	9.9	11.7
Jan-03	7.4	7.4	10.4	4.6	7.7	1.7	2.2	38.4	8.6	16.0	7.2
Feb-03	-3.4	-3.0	-4.2	-2.0	-5.9	-14.3	4.3	6.4	5.2	8.4	7.6
Mar-03	-11.7	-10.7	-9.9	-11.4	-16.2	-12.5	-13.4	-18.2	-1.1	-1.3	11.4
Apr-03	-10.9	-9.2	-8.9	-9.5	-19.1	-42.1	14.0	0.9	-13.7	-12.2	-21.8
May-03	-13.9	-10.3	-8.3	-12.0	-29.9	-56.1	0.9	16.7	-5.2	-0.7	-23.7
Jun-03	-13.0	-11.5	-9.5	-12.9	-20.4	-41.4	-2.1	16.7	-1.9	0.1	-18.6
Jul-03	-7.7	-5.9	-3.8	-7.1	-15.9	-32.3	1.9	-0.9	1.7	6.7	-1.0
Aug-03	-3.9	-3.3	-0.2	-5.0	-6.7	-15.2	2.8	3.4	8.8	13.9	7.6
Sep-03	-7.5	-7.2	-5.6	-8.4	-8.8	-18.4	-1.7	8.5	1.3	7.1	6.2
Oct-03	-9.7	-8.6	-7.7	-9.5	-14.6	-18.2	-3.8	-12.1	0.0	4.0	12.3
Nov-03	-10.4	-10.7	-11.8	-9.6	-8.7	-9.4	-12.0	-8.3	8.1	8.5	15.9
Dec-03	-7.6	-8.9	-11.9	-6.4	-1.5	-1.0	-4.0	-1.4	3.8	3.8	13.4
Jan-04	-11.5	-13.8	-16.0	-11.6	-0.2	2.2	-6.0	-2.4	0.3	1.7	1.4

*** Australia, New Zealand, and other South Pacific nations**
SOURCE: Statistics Canada

Table 8: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International								Canadian		
	Total	USA			Overseas				Total	USA same-day auto	Overseas
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**			
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0	9,588.1	5,813.1	798.7
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8	9,435.2	5,639.0	866.4
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9	8,328.6	4,720.3	902.8
2002	7,960.1	6,583.2	2,808.1	3,787.8	1,376.9	764.0	411.8	118.0	7,187.8	3,582.5	924.9
2003	7,325.9	6,128.2	2,627.8	3,509.7	1,197.7	577.6	410.1	124.8	7,260.8	3,726.9	934.5
Quarterly data											
2002 Q4	2,057.9	1,695.5	727.8	964.3	362.4	197.9	108.7	32.5	1,881.8	975.9	238.4
2003 Q1	1,885.5	1,569.6	675.9	908.9	315.9	161.2	106.6	30.9	1,790.8	913.2	235.3
2003 Q2	1,751.4	1,485.6	632.2	855.9	265.8	99.0	101.5	31.1	1,659.6	839.6	194.1
2003 Q3	1,851.0	1,550.9	670.2	878.1	300.1	145.5	100.4	31.8	1,869.3	958.4	239.4
2003 Q4	1,838.1	1,522.2	649.5	866.8	315.9	171.8	101.5	31.0	1,941.1	1,015.7	265.8
Monthly data											
Aug-02	673.3	559.2	230.5	316.4	114.1	61.0	31.8	10.1	602.9	293.4	76.0
Sep-02	664.7	549.9	233.1	306.2	114.8	64.9	32.7	9.9	620.6	305.5	78.2
Oct-02	699.8	571.4	238.9	335.0	128.4	73.7	34.2	10.6	625.6	321.2	77.7
Nov-02	678.8	558.9	246.1	314.3	119.9	65.1	39.2	11.0	628.4	330.7	79.2
Dec-02	679.3	565.2	242.8	315.0	114.1	59.1	35.4	10.9	627.9	324.0	81.5
Jan-03	661.1	548.3	245.8	315.9	112.7	57.1	35.8	12.0	612.1	315.9	77.3
Feb-03	630.6	526.2	225.1	305.4	104.4	52.1	37.2	10.3	603.3	309.2	77.7
Mar-03	593.8	495.1	204.9	287.7	98.8	52.0	33.7	8.6	575.3	288.1	80.2
Apr-03	583.3	493.1	209.3	283.4	90.2	36.4	35.1	9.3	514.8	256.0	64.9
May-03	574.6	490.6	210.1	282.5	84.0	27.7	33.5	10.8	559.8	289.2	60.0
Jun-03	593.6	501.9	212.9	289.9	91.6	34.9	33.0	11.0	585.1	294.4	69.2
Jul-03	607.7	512.5	219.7	291.3	95.1	41.3	33.3	10.3	600.9	302.0	76.1
Aug-03	623.3	521.5	225.1	296.3	101.8	50.9	33.6	10.6	632.6	324.6	81.5
Sep-03	620.0	516.8	225.3	290.4	103.1	53.3	33.4	10.8	635.8	331.8	81.8
Oct-03	616.3	511.1	222.1	291.4	105.2	57.9	33.6	9.9	629.8	332.7	86.6
Nov-03	609.2	504.3	213.8	286.8	104.9	57.0	34.1	10.4	658.3	345.5	91.3
Dec-03	612.6	506.8	213.6	288.5	105.8	57.0	33.9	10.8	652.9	337.6	87.9
Jan-04	589.9	483.5	205.0	278.2	106.4	57.4	33.5	11.5	614.1	320.9	77.9
Month-over-month percent changes											
Aug-02	3.0	2.9	1.2	-0.3	3.7	-4.1	1.1	0.3	0.9	3.4	-1.1
Sep-02	-1.3	-1.7	1.1	-3.2	0.5	6.4	2.9	-2.1	2.9	4.1	2.8
Oct-02	5.3	3.9	2.5	9.4	11.9	13.5	4.5	7.0	0.8	5.1	-0.6
Nov-02	-3.0	-2.2	3.0	-6.2	-6.6	-11.7	14.6	4.1	0.4	2.9	1.9
Dec-02	0.1	1.1	-1.4	0.2	-4.8	-9.3	-9.7	-1.7	-0.1	-2.0	3.0
Jan-03	-2.7	-3.0	1.3	0.3	-1.2	-3.3	1.1	10.2	-2.5	-2.5	-5.1
Feb-03	-4.6	-4.0	-8.4	-3.3	-7.4	-8.7	4.0	-14.3	-1.4	-2.1	0.5
Mar-03	-5.8	-5.9	-9.0	-5.8	-5.4	-0.3	-9.5	-15.8	-4.6	-6.8	3.1
Apr-03	-1.8	-0.4	2.1	-1.5	-8.7	-30.0	4.2	7.1	-10.5	-11.2	-19.1
May-03	-1.5	-0.5	0.4	-0.3	-6.9	-23.9	-4.6	16.9	8.7	13.0	-7.6
Jun-03	3.3	2.3	1.3	2.6	9.1	26.2	-1.4	1.9	4.5	1.8	15.4
Jul-03	2.4	2.1	3.2	0.5	3.8	18.2	0.9	-6.1	2.7	2.6	9.9
Aug-03	2.6	1.8	2.5	1.7	7.0	23.2	1.0	2.9	5.3	7.5	7.1
Sep-03	-0.5	-0.9	0.1	-2.0	1.3	4.7	-0.6	1.7	0.5	2.2	0.3
Oct-03	-0.6	-1.1	-1.4	0.3	2.0	8.5	0.5	-9.0	-0.9	0.3	5.9
Nov-03	-1.2	-1.3	-3.7	-1.6	-0.3	-1.5	1.4	5.3	4.5	3.8	5.5
Dec-03	0.6	0.5	-0.1	0.6	0.9	-0.1	-0.6	4.2	-0.8	-2.3	-3.7
Jan-04	-3.7	-4.6	-4.0	-3.6	0.5	0.7	-1.1	6.2	-5.9	-5.0	-11.4

*** Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total**

**** Australia, New Zealand, and other South Pacific nations**

SOURCE: BC STATS, Statistics Canada

Table 9: Transportation Indicators (Historical)

Period	Air Passenger Traffic (000s)								Other Transportation (000s)		
	Vancouver				Victoria	Kelowna	Prince George	Comox Valley	BC Ferries		Coquihalla Hwy
	Total	Domestic	Trans-border	Other Int'l.	Total	Total	Total	Total	Vehicles	Passengers	Passenger Vehicles
1999	15,806	8,314	4,120	3,372	1,191.4	815.1	352.2	62.8	7,852	21,369	2,378
2000	16,033	8,306	4,074	3,652	1,139.2	835.9	392.9	72.6	7,887	21,280	2,389
2001	15,477	7,869	4,000	3,608	1,158.2	850.3	361.9	132.1	8,104	21,309	2,449
2002	14,878	7,422	3,855	3,600	1,102.2	836.9	325.4	148.7	8,272	21,540	2,518
2003	14,322	7,267	3,814	3,241	1,182.9	863.6	339.8	166.8	8,263	21,339	2,466
Quarterly data											
2002 Q4	3,319	1,747	780	793	263.9	207.8	89.1	34.7	1,860	4,627	480
2003 Q1	3,308	1,621	883	803	258.1	220.8	85.2	32.2	1,655	4,030	358
2003 Q2	3,285	1,723	909	652	289.1	193.9	82.6	38.1	2,113	5,388	679
2003 Q3	4,393	2,136	1,256	1,001	331.8	227.5	83.4	54.6	2,710	7,535	970
2003 Q4	3,336	1,786	766	784	303.9	221.5	88.6	41.8	1,785	4,386	459
Monthly data											
Aug-02	1,661	790	470	401	110.9	83.5	27.4	17.7	1,013	2,975	415
Sep-02	1,308	642	332	334	90.4	65.3	26.2	12.6	752	1,927	251
Oct-02	1,198	641	263	293	95.7	69.7	29.6	12.3	667	1,670	203
Nov-02	963	507	227	229	77.9	60.2	28.2	9.3	574	1,385	126
Dec-02	1,158	599	289	270	90.3	77.9	31.3	13.2	619	1,572	151
Jan-03	1,119	537	292	289	78.8	72.8	27.1	10.2	522	1,253	103
Feb-03	1,030	513	277	240	84.1	69.8	27.5	10.1	519	1,244	113
Mar-03	1,159	570	314	274	95.2	78.3	30.6	11.9	614	1,533	142
Apr-03	970	522	244	203	94.3	63.1	27.0	12.3	646	1,608	191
May-03	1,083	584	299	200	98.9	65.9	29.3	12.5	714	1,827	232
Jun-03	1,232	618	366	249	95.9	64.9	26.3	13.3	753	1,953	257
Jul-03	1,483	715	453	314	109.8	78.6	27.2	19.1	930	2,618	356
Aug-03	1,641	784	482	375	121.8	84.0	29.2	20.4	1,032	3,032	388
Sep-03	1,269	636	321	312	100.2	64.9	27.0	15.2	748	1,885	226
Oct-03	1,161	636	248	276	110.5	70.4	29.9	14.3	672	1,657	209
Nov-03	985	524	233	229	88.6	66.0	27.3	11.2	570	1,358	112
Dec-03	1,191	626	285	279	104.8	85.0	31.4	16.4	543	1,371	138
Jan-04	1,136	552	289	295	88.6	77.1	26.6	12.3	498	1,193	96
Year-over-year percent changes											
Aug-02	-7.7	-8.2	-8.7	-5.5	-8.9	-1.7	-12.0	n/a	2.4	2.9	3.5
Sep-02	12.6	12.4	23.1	4.0	13.1	11.8	1.1	n/a	3.0	1.3	0.1
Oct-02	12.5	7.1	16.9	21.7	0.0	5.7	2.9	n/a	4.1	5.0	7.8
Nov-02	4.7	-1.9	7.0	20.1	0.1	-1.4	6.0	n/a	1.1	2.2	3.6
Dec-02	4.3	1.8	9.3	5.0	1.5	4.3	10.8	n/a	3.7	3.1	9.7
Jan-03	2.8	-0.1	4.3	7.0	2.9	8.3	6.2	2.2	5.0	5.2	5.8
Feb-03	-0.6	-1.0	2.0	-2.9	7.4	2.0	13.0	-1.6	4.2	4.0	7.8
Mar-03	-1.4	-2.4	4.6	-5.5	0.2	5.0	18.3	3.6	0.8	-1.6	-11.9
Apr-03	-13.6	-10.8	-8.1	-25.1	-0.8	-0.6	6.9	10.1	1.1	2.8	12.5
May-03	-13.2	-9.3	-2.7	-32.5	0.3	-1.0	6.8	-0.4	-2.5	-3.1	-0.4
Jun-03	-9.8	-5.7	-4.4	-24.4	0.6	-0.5	-2.3	8.2	0.3	-1.7	4.3
Jul-03	-4.5	-0.4	-2.8	-14.4	11.9	5.0	-0.7	19.4	1.0	-0.5	-1.4
Aug-03	-1.2	-0.7	2.7	-6.6	9.8	0.5	6.6	14.9	1.9	1.9	-6.5
Sep-03	-3.0	-0.9	-3.4	-6.7	10.8	-0.7	3.2	20.8	-0.5	-2.2	-9.7
Oct-03	-3.1	-0.8	-5.7	-5.9	15.5	1.1	0.9	16.2	0.7	-0.8	3.1
Nov-03	2.2	3.3	2.4	-0.2	13.7	9.6	-3.2	20.7	-0.7	-1.9	-11.2
Dec-03	2.8	4.6	-1.5	3.4	16.1	9.1	0.3	24.7	-12.3	-12.8	-8.8
Jan-04	1.5	2.7	-1.1	2.0	12.4	5.9	-1.7	19.9	-4.6	-4.8	-6.8

Table 10: Tourism Sector Indicators

Period	Employment (000s) [1]						Hotel Industry [2]		Consumer Price Index [1]	
	BC Total	Key industries in tourism sector								
	Industrial aggregate	Air transport	Heritage Institutions	Accom-modation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) [3]	Room Rate ($)	Traveller accom-modation	Restaurant food
1999	1,511.5	15.3	2.3	29.2	110.1	24.7	61.7	112.02	133.1	115.6
2000	1,571.8	14.8	2.3	28.2	116.7	26.5	60.0	114.04	139.4	117.6
2001	1,593.1	13.5	2.4	29.5	117.8	27.4	59.3	116.12	133.4	121.3
2002	1,610.2	12.2	2.5	29.2	118.1	28.8	58.9	116.99	124.2	125.4
2003	1,636.8	12.7	2.8	29.0	117.7	30.6	58.3	115.02	111.8	127.6
Quarterly data										
2002 Q4	1,628.9	12.6	2.6	28.2	117.9	28.9	48.0	103.00	108.3	126.3
2003 Q1	1,612.4	12.8	2.5	26.9	114.0	29.8	51.9	117.66	104.8	126.9
2003 Q2	1,655.1	13.1	2.8	29.4	118.8	32.5	59.4	113.68	116.1	126.9
2003 Q3	1,637.3	12.7	3.1	32.0	120.6	31.4	72.3	127.13	127.5	128.1
2003 Q4	1,642.4	12.4	2.9	27.6	117.5	28.7	49.6	101.59	99.0	128.5
Monthly data										
Aug-02	1,616.2	12.6	2.6	32.4	122.8	30.2	80.0	135.68	148.8	126.0
Sep-02	1,639.1	12.4	2.6	29.9	121.3	29.5	67.2	121.04	138.1	126.1
Oct-02	1,639.7	12.3	2.6	29.5	121.3	29.4	56.3	101.16	115.9	126.1
Nov-02	1,628.9	12.5	2.6	27.9	116.6	28.4	45.6	92.87	105.3	126.2
Dec-02	1,618.0	13.0	2.6	27.3	115.9	29.1	42.2	114.97	103.7	126.7
Jan-03	1,602.2	12.5	2.5	27.8	114.4	29.5	44.2	117.82	104.0	126.9
Feb-03	1,612.5	12.7	2.5	26.5	113.1	29.3	54.7	121.26	106.3	127.0
Mar-03	1,622.5	13.2	2.4	26.4	114.4	30.5	56.9	113.91	104.1	126.9
Apr-03	1,635.8	13.0	2.8	27.7	117.0	32.2	55.6	104.95	105.8	126.8
May-03	1,654.5	13.1	2.7	29.5	119.8	32.5	60.0	113.92	118.1	126.9
Jun-03	1,674.9	13.1	3.1	30.9	119.7	32.9	62.6	122.17	124.3	127.1
Jul-03	1,634.2	12.9	3.2	32.0	122.4	31.9	71.1	130.51	129.8	127.8
Aug-03	1,635.6	12.6	3.2	33.2	122.0	31.9	79.5	131.13	131.0	128.3
Sep-03	1,642.0	12.7	2.9	30.9	117.5	30.4	66.2	119.75	121.7	128.2
Oct-03	1,652.3	12.5	2.9	29.2	118.2	28.9	56.8	100.28	110.0	128.3
Nov-03	1,634.2	12.4	2.8	27.1	116.3	28.1	48.0	91.15	94.6	128.6
Dec-03	1,640.6	12.3	2.9	26.3	117.9	29.2	44.0	113.34	92.4	128.5
Jan-04	1,618.1	12.4	3.0	25.4	117.3	30.2	n/a	n/a	90.0	129.1
Year-over-year percent changes										
Aug-02	1.3	-6.9	3.6	-4.1	1.2	6.4	0.5	-0.2	-6.8	3.2
Sep-02	1.6	-5.6	4.8	-6.0	1.4	4.6	3.1	1.2	-8.1	3.1
Oct-02	1.5	-4.6	3.8	-3.1	2.0	4.2	5.1	0.8	-6.0	2.6
Nov-02	2.3	5.9	7.9	-2.5	3.1	5.0	0.6	-0.4	-3.7	2.6
Dec-02	2.5	10.8	11.3	-1.8	2.6	7.7	0.6	3.5	-3.9	2.8
Jan-03	2.3	9.0	4.3	0.7	2.1	9.7	1.4	5.3	-5.8	2.3
Feb-03	2.7	8.9	3.0	-3.1	2.3	6.8	0.5	2.6	-7.5	2.1
Mar-03	2.5	12.5	1.9	-3.9	1.9	10.5	-0.6	-4.8	-8.0	1.8
Apr-03	2.5	7.5	18.0	-1.0	0.1	14.7	-2.9	-2.4	-7.2	1.6
May-03	2.5	7.6	4.2	0.6	-1.5	12.5	-1.4	-1.5	-11.6	1.8
Jun-03	2.4	10.1	20.8	-1.7	-2.3	10.8	-4.6	-6.0	-12.6	1.5
Jul-03	1.2	2.5	22.5	0.1	-0.3	5.4	-2.9	-3.6	-13.4	1.8
Aug-03	1.2	0.4	21.3	2.4	-0.7	5.5	-0.5	-3.4	-12.0	1.8
Sep-03	0.2	1.8	10.1	3.3	-3.1	3.1	-1.0	-1.1	-11.9	1.7
Oct-03	0.8	1.1	10.6	-0.9	-2.6	-1.7	0.5	-0.9	-5.1	1.7
Nov-03	0.3	-0.7	10.7	-2.7	-0.2	-1.0	2.4	-1.9	-10.2	1.9
Dec-03	1.4	-5.3	10.3	-3.3	1.8	0.5	1.8	-1.4	-10.9	1.4
Jan-04	1.0	-0.9	19.3	-8.6	2.5	2.2	n/a	n/a	-13.5	1.7

[1]Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours)

[2]Source: Pannell Kerr Forster

[3]Occupancy Rate change expressed as percentage point change

Table 12: BC Restaurant and Tavern Receipts Seasonally Adjusted

Period	Restaurants and Taverns [1]					
	Receipts ($ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
1999	4,467.5	369.8	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
2003	5,388.8	284.4	5,104.3	33,648.9	2,089.1	31,559.8
Quarterly data						
2002 Q4	1,301	74	1,228	8,428	563	7,866
2003 Q1	1,279	71	1,207	8,265	532	7,734
2003 Q2	1,291	72	1,219	8,267	527	7,741
2003 Q3	1,382	71	1,311	8,442	523	7,919
2003 Q4	1,437	69	1,367	8,674	507	8,167
Monthly data						
Aug-02	416	24	392	2,768	179	2,589
Sep-02	417	25	392	2,795	191	2,604
Oct-02	421	24	398	2,782	188	2,595
Nov-02	444	25	418	2,792	187	2,604
Dec-02	436	25	412	2,854	188	2,667
Jan-03	427	24	403	2,742	175	2,567
Feb-03	426	24	402	2,757	178	2,578
Mar-03	426	23	403	2,767	178	2,588
Apr-03	430	25	405	2,722	179	2,543
May-03	431	24	407	2,770	173	2,597
Jun-03	431	24	406	2,775	175	2,600
Jul-03	453	24	428	2,792	182	2,610
Aug-03	463	24	439	2,821	174	2,647
Sep-03	466	23	444	2,829	168	2,661
Oct-03	473	22	451	2,871	169	2,702
Nov-03	481	23	458	2,897	170	2,727
Dec-03	483	24	459	2,906	168	2,738
Jan-04	501	28	473	2,989	170	2,819
%Change						
Aug-02	-0.6	-0.4	-0.7	-0.8	-4.0	-0.5
Sep-02	0.0	1.8	-0.1	1.0	7.0	0.6
Oct-02	1.2	-4.2	1.5	-0.5	-2.0	-0.4
Nov-02	5.3	5.2	5.3	0.3	-0.1	0.4
Dec-02	-1.6	-1.5	-1.6	2.2	0.2	2.4
Jan-03	-2.1	-1.9	-2.1	-3.9	-6.7	-3.7
Feb-03	-0.3	-0.9	-0.3	0.5	1.9	0.4
Mar-03	0.0	-3.8	0.2	0.4	-0.2	0.4
Apr-03	1.0	6.5	0.7	-1.6	0.4	-1.8
May-03	0.2	-3.9	0.4	1.8	-3.4	2.1
Jun-03	0.0	1.8	-0.2	0.2	1.3	0.1
Jul-03	5.2	1.0	5.4	0.6	3.8	0.4
Aug-03	2.3	-1.0	2.5	1.1	-4.2	1.4
Sep-03	0.7	-5.3	1.0	0.3	-3.6	0.5
Oct-03	1.4	-3.4	1.7	1.5	0.6	1.5
Nov-03	1.6	3.6	1.5	0.9	0.9	0.9
Dec-03	0.5	5.6	0.2	0.3	-1.3	0.4

[1]Source: Statistics Canada

Note: with the change to NAICS (North American Industry Classification System) coding, many of the series are not available prior to January 1999.

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below $20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Visit BC STATS on the World Wide Web at www.bcstats.gov.bc.ca

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May 7, 2004
Issue: 04-04

Tourism Sector Monitor ◆ April 2004

Room Revenue

Room revenues in BC fell 2.7% (seasonally adjusted) in January, following three months of growth.

Almost every region in the province saw revenues drop, especially Northeast (-8.8%), Kootenay (-5.2%), and Cariboo (-4.5%). The only region with marginally positive growth was Vancouver Island/Coast (+0.2%). Indeed, over the last 12 months, Vancouver Island/Coast has been the only major region showing a strong tourism sector.

Room revenues edge downward in January

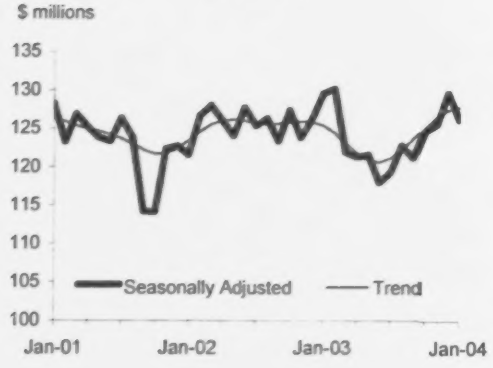


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	Jan.04 ($000)	Dec.03 ($000)	% change
Total	126,177	129,618	-2.7
Hotels	92,674	94,346	-1.8
Motels	15,557	15,948	-2.5
Other Acc.	17,966	19,193	-6.4
Regions (Top 3 performers)			
Van. Island/Coast	23,863	23,813	+0.2
Nechako	718	730	-1.6
North Coast	1,651	1,680	-1.7

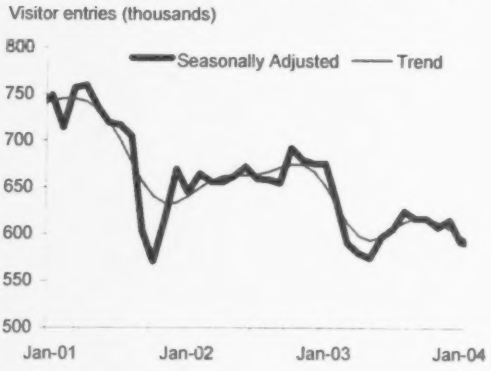
As with the regions, virtually all accommodation types saw slower business in January. Revenues were down 1.8% at hotels, and down 2.5% at motels. Revenues at "other" accommodation types—which includes cabins, bed & breakfasts, ski resorts, and the like—fell 6.4%.

Visitor Entries

The fall in room revenues corresponds to a drop in visitors entering the province. The volume of travellers entering Canada via BC fell 3.2% (seasonally adjusted) in January. This was mostly due to fewer travellers from the US. Same-day visits from the US were down 3.4%, while overnight visits dropped 3.9%.

In contrast, overseas entries on the whole were unchanged. Asian visitor entries inched up slightly (0.8%). A significant drop in entries from Japan (-7.3%) largely offset increases in visitors from Korea, Taiwan and Hong Kong.

Visitor entries drop in January



Special Focus Article: *Regional Airports in BC.* Page 4.

Table 2. Traveller Entries
(seasonally adjusted)

	Jan-04 ('000)	Dec-03 ('000)	% chg from Dec-03
American visitors			
Total	484	503	-3.7
Same-day	207	214	-3.4
Overnight	276	287	-3.9
Overseas visitors			
Total	107	107	-0.1
Europe	34	34	-1.0
UK	17	17	-0.4
Asia	57	57	0.8
Japan	19	20	-7.3
Taiwan	7	6	12.4
Oceania	12	11	6.4

(BC STATS & Statistics Canada)

note: Total Overseas visitors is not equal to the sum of Europe, Asia and Oceania, as it also includes other areas

As a bright note, there was continued growth in visitors from Australia and the South Pacific (+6.4%). However, this region still only accounts for about 11% of the overseas market.

Other Indicators

Weak demand in the tourism sector has been putting downward pressure on prices. The consumer price index for traveller accommodation was 13.5% lower than in January of last year.

For hotels, the effort to boost occupancy through lower prices has been working to a degree. Both price and occupancy began to fall in the spring of 2003. Hotel room rates are still lower than they were 12 months ago (-4.6%), but occupancy is starting to recover, up 1.4 percentage points over January of last year. Employment in the accommodation sector, however, remains well below last year's levels (-8.6%).

Passenger vehicle traffic over the Coquihalla highway dropped (-6.8%) in January, compared to the same month of 2003. This has no doubt been a source of weakness for the tourism market in Thompson-Okanagan and Cariboo.

BC Ferries traffic is also below its level from January of last year, with 4.6% fewer vehicles. However, this is a substantial improvement over December, when job action early in the month reduced the ferry system to essential service levels.

The downs and ups of the ferry system over the last two months likely has much to do with Vancouver Island room revenue trends. In December—the month of the ferry strike—room revenues on Vancouver Island lagged behind every other region of the province. In January, with ferry traffic "back to normal," Vancouver Island was the only region showing month-over-month revenue growth.

The Canada-US exchange rate continues to discourage American travel in Canada. The Canadian dollar was worth 77 cents US in January, compared to 65 cents in the same month last year.

Table 3. Other Tourism Indicators

	Total	Change from year ago
Hotel Industry		
Occupancy rate	45.6	1.4 pp.
Average room charge *(Pannell Kerr Forster)*	112.35	-4.6%
Airport Passengers	(000s)	(%)
Vancouver International Airport		
Total traffic	1,136	1.5
US	289	-1.1
Other International	295	2.0
Canada *(YVR)*	552	2.7
Victoria International Airport		
Total traffic *(Victoria Airport Authority)*	89	12.4
Transportation	(000s)	(%)
Coquihalla Highway		
Passenger Vehicles *(Ministry of Transportation & Highways)*	96	-6.8
BC Ferries		
Vehicle Volume	498	-4.6
Passenger Volume *(BC Ferries)*	1,193	-4.8
Exchange Rates	Cdn $	Change from year ago
US $	1.296	-0.25
UK Pound	2.363	-0.13
Japanese Yen	0.012	0.00
Australian $ *(Statistics Canada)*	0.999	0.10

note: pp. percentage points

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues were lacklustre in **February**, inching upward 0.5% (seasonally adjusted). Revenues were strongest in the interior (Kooteney and Cariboo), and relatively flat in the coastal region (Vancouver Island and the Mainland).

A caution about preliminary numbers

Because companies file their hotel room taxes with a varying lag, the initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a two-month lag. However, we also briefly report "preliminary data" with a one-month lag.

How accurate is the preliminary data? Over eight reports in 2003, room revenues changed (rose or fell on a month-over-month basis) on average by 3.2% (absolute value). Our preliminary numbers—reported in the "look ahead" box—were off by an average of 0.4 percentage points. The preliminary figures, in other words, seem basically on the mark, though they should be used with caution (a more detailed analysis of their accuracy will be undertaken in the future).

Visitor entries were unchanged in February (+0.1%, seasonally adjusted). A drop in visitor entries from Asia (-4.6%) was offset by a small increase in same-day trips from the US (+0.6%).

In contrast to room revenues and visitor entries, transportation indicators were relatively strong in February. Traffic over the Coquihalla highway was up 3.7% compared to February of last year, a modest recovery after three months of decline. BC Ferries vehicle traffic was up 5.4% compared to 12 months earlier, the strongest increase in over a year.

The Canadian dollar depreciated 1.7 cents against the US dollar in February, which may help to explain the modest increase in same-day trips from the US.

Special Focus: Regional Airports in BC

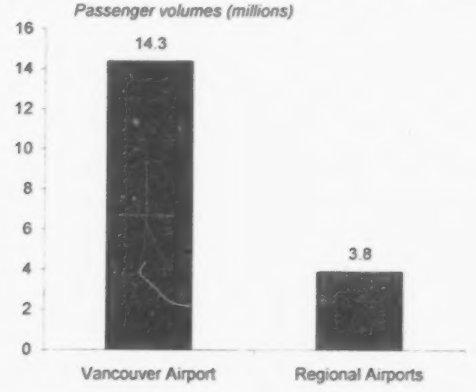
British Columbia's regional airports recorded nearly four million passengers passing through their gates last year—close to the total population of BC. This report examines recent trends in regional airports, and considers their role in BC tourism.

There are 21 regional airports in BC, most of which are very small. Two-thirds of the regional airports have a market share of less than 3% each. At the other end, the two largest regional airports—Victoria and Kelowna—together manage more than half (53%) of all regional airport passengers.

Combined, the regional airports reported 3.8 million passenger counts in 2003. This is up from 3.3 million passenger counts in 1997 (+17%).

The Vancouver International Airport reported 14.3 million passenger counts in 2003—almost three times more than all the regional airports combined.

Vancouver airport nearly three times larger than regional airports combined



In recent years there has been a significant decline in passenger traffic at the Vancouver airport. Passenger counts are down 3% from 1997, representing a drop of about half a million people. However, the increasing traffic at the regional airports has left overall airport passenger counts unchanged.

Regional airports busier as Vancouver declines

Total traffic volume at all of these airports in BC amounted to 18.2 million passengers in 2003, up marginally from 18.1 million in 1997.

Regional airports managed 21% of total traffic in 2003, up from 18% in 1997. Thus, traffic patterns at BC airports are changing—shifting away from the "hub" towards the smaller airports.

However, shifting patterns of airport use is not the only story. On a per capita basis passenger volumes are lower than in the late 1990s.

In 1997, there were 4.6 passenger counts per capita in BC. By 2000, traffic had risen to 4.9 per capita. Over the last three years, passenger counts have fallen to 4.4 per capita—down 4.5% from 1997.

Thus, despite the growth of regional airport traffic, BC's overall air passenger transportation system is struggling.

A note on the data and sources:

Passenger counts were reported directly by the regional airports in BC. Nanaimo data were collected from reports by Grant Thorton. Data for the Port Hardy and Penticton airports were not reported. These are both very small airports, and result in only a negligible undercount. Two small airports, Cranbrook and Powell River, did not provide data for all years. In these cases, data for the missing years was estimated. Finally, in Castlegar, counts were available only for passengers boarding planes. These data were used to estimate the number of passengers disembarking at that airport.

With the exception of Port Hardy and Penticton, this report covers all of the airports designated by Transport Canada as national, regional, or local. Smaller airstrips that do not have regularly scheduled passenger service are not included.

Background: The Decentralization of BC Airports

Up until the early 1990s, virtually all airports in Canada were owned and operated by the federal government. A decentralization policy, laid out in the mid-1990s, was grounded in the idea that "locally-owned and operated airports are able to function in a more commercial and cost-efficient manner, are more responsive to local needs and are better able to match levels of service to local demands"[1].

Since the mid-1990s, Transport Canada has divested virtually all of its regional airports. However, this was not a policy of privatization. Ownership and operations has been transferred to municipal governments or non-profit airport authorities. Only two regional airports in BC—Port Hardy and Penticton—are still operated by Transport Canada.

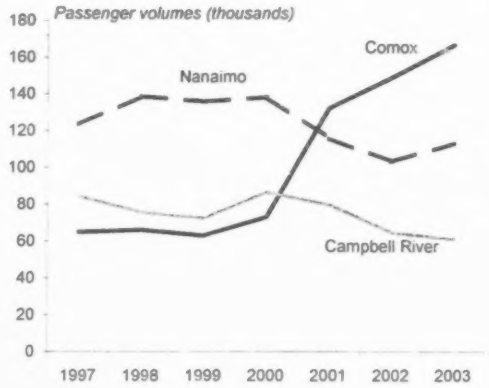
For the three regional airports in BC that are part of the National Airports System—Victoria, Kelowna, and Prince George—ownership has been retained by Transport Canada but operations are managed by a local non-profit authority.

At virtually all BC airports, operations had been transferred to local authorities by 1997. This report looks at the regional airports for the years since decentralization: 1997 to 2003.

Regional competition

Most of the regional airports in BC are served by Jazz, Air Canada's regional airline. There are two small carriers that specialize in service to northern BC—Central Mountain Air and Hawkair. Since 1996, WestJet has emerged as a highly competitive, low-cost airline now operating out of six BC airports.

Competition between airlines, in some places, has led to competition between airports. The cluster of airports in mid-Vancouver Island—Comox, Nanaimo, and Campbell River—is a good illustration. In 2001, WestJet established a direct flight from Calgary to Comox. Passenger counts have exploded at Comox, rising 130% between 2000 and 2003. However, passengers dropped 18% at Nanaimo, and 29% Campbell River. The combined increase in passengers at the three airports was small—only 8%.



1 http://www.tc.gc.ca/programs/airports/policy/nap/NAP.htm

A similar pattern is showing in the passenger traffic at Vancouver and Abbotsford. In 1997, the Abbotsford airport was rarely used, having a traffic volume similar to Cranbrook. However, WestJet has since made Abbotsford a major base of operations. Last year, Abbotsford was the third largest airport in BC, with a 451% growth in passengers since 1997. At the same time, domestic passenger traffic in Vancouver fell 9%, due at least in part to competition from Abbotsford.

This sort of competition may give airports a stronger incentive to reduce their operating costs, improve passenger services, and the like.

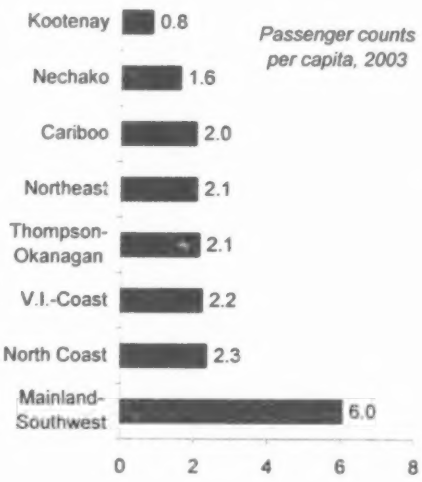
Development Regions

Aggregating the airport statistics into the standard development regions of the province provides a broad overview of the regional system.

The regional airports seem well distributed across the province. Most regions of BC have several local airports, and their size, for the most part, matches the local population.

In the Mainland/Southwest region, there were 6.0 passenger counts per capita in 2003, owing to the massive presence of Vancouver International. The lowest number of passengers per capita was in the Kooteney region (0.8). This region includes much of the BC Rockies, and the Calgary International Airport likely services a good part of the region's air traffic. In the other regions of the province, passenger counts are quite consistent, at a little over 2 per capita.

Most Regions of BC have Similar Air Traffic Volumes



The regions of BC, excluding Mainland-Southwest and Kooteney, seem more or less equally served by their regional airport systems. Vancouver Island, Thompson-Okanagan, Cariboo, Northeast, and North Coast all have roughly the same traffic volumes on a per capita basis.

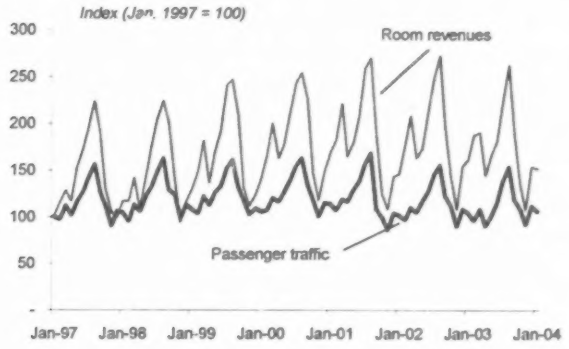
Nevertheless, proximity to BC's major international airport in Vancouver—which handles almost 80% of the province's passenger traffic—remains a crucial factor. For example, a bus ride from downtown Victoria to Vancouver International Airport takes little more than three hours. From Prince Rupert, the bus ride is 24 hours.

Air Traffic and BC Tourism

Regional passenger traffic has an uneven relationship with tourism room revenues. In some parts of the province, airports are an important part of the tourism transportation system. In other places, passenger volumes have little if anything to do with the local tourism economy. Two BC airports serve as illustrations: Vancouver and Prince George.

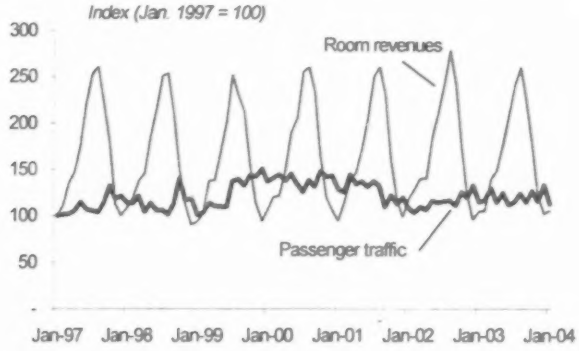
In the Mainland/Southwest region, monthly room revenues are closely correlated with passenger counts at the Vancouver airport.

Passenger Traffic at Vancouver Airport Closely Related to Room Revenues



In the Cariboo region, things look rather different. Traffic volumes at the Prince George Airport—the only airport in Cariboo—have no relation at all to the region's room revenues. Indeed, passenger traffic does not even show a seasonal pattern, in sharp contrast to room revenues. It seems that in the Cariboo region tourists are not a major part of airport traffic.

Room Revenues in Cariboo Unrelated to Passenger Traffic



There is not sufficient monthly data readily available for a more in-depth analysis. However, it appears that the Prince George airport is fairly representative of the regional airports. For the Victoria and Kelowna airports—the two largest regional airports—there is a statistical correlation between room revenues and passenger counts, but it is not very strong. Even these airports are transporting, at best, a small share of the region's tourist traffic.

In short, it seems that most of the regional airports primarily serve the transportation needs of local residents, and only have a secondary function as part of the tourism infrastructure.

Development Regions

Passenger traffic (thousands) Development Region	1997	1998	1999	2000	2001	2002	2003	% change 1997-2003
1. Vancouver Island/Coast	1,461.3	1,580.7	1,548.7	1,523.0	1,578.8	1,486.3	1,588.2	8.7
2. Mainland/Southwest	14,895.2	15,697.5	15,998.2	16,263.4	15,783.5	15,244.9	14,744.0	-1.0
3. Thompson - Okanagan	929.5	1,002.8	999.3	1,025.5	1,033.4	991.9	1,045.3	12.5
4. Kootenay	160.5	164.2	161.3	157.9	152.0	129.4	125.5	-21.8
5. Cariboo	312.3	322.8	352.2	392.9	361.9	325.4	339.8	8.8
6. North Coast	160.7	160.2	144.0	142.5	154.3	146.1	150.2	-6.6
7. Nechako	81.9	83.3	75.6	59.1	53.8	66.3	69.2	-15.4
8. Northeast	131.6	133.3	129.4	116.2	117.3	109.5	131.7	0.1
Total	18,133.1	19,144.8	19,408.7	19,680.5	19,235.0	18,499.9	18,193.9	0.0

Passenger traffic per capita Development Region	1997	1998	1999	2000	2001	2002	2003	% change 1997-2003
1. Vancouver Island/Coast	2.0	2.2	2.2	2.1	2.2	2.1	2.2	7.7
2. Mainland/Southwest	6.6	6.9	6.9	6.9	6.6	6.3	6.0	-8.9
3. Thompson - Okanagan	2.0	2.1	2.1	2.1	2.1	2.0	2.1	9.0
4. Kootenay	1.1	1.1	1.1	1.0	1.0	0.9	0.8	-21.4
5. Cariboo	1.8	1.9	2.1	2.3	2.2	2.0	2.0	13.7
6. North Coast	2.3	2.3	2.1	2.2	2.4	2.3	2.3	3.4
7. Nechako	1.8	1.8	1.7	1.3	1.2	1.5	1.6	-12.1
8. Northeast	2.0	2.1	2.0	1.8	1.8	1.7	2.1	1.6
Total	4.6	4.8	4.8	4.9	4.7	4.5	4.4	-4.5

Source: BC Stats

Tourism Regions

Passenger traffic (thousands) Tourism Regions	1997	1998	1999	2000	2001	2002	2003	% change 1997-2003
Vancouver Island	1,374.8	1,494.2	1,462.3	1,436.5	1,485.6	1,418.5	1,524.0	10.9
Vancouver, Coast & Mountain	14,938.5	15,740.7	16,041.4	16,306.6	15,830.1	15,278.9	14,776.1	-1.1
Thompson-Okanagan	878.3	954.1	959.1	982.9	989.5	953.9	1,002.2	14.1
Kootenay Rockies	160.5	164.2	161.3	157.9	152.0	129.4	125.5	-21.8
Cariboo Chilcotin Coast	51.2	48.7	40.2	42.6	43.8	37.9	43.2	-15.7
Northern BC	686.5	699.6	701.2	710.8	687.3	647.3	690.9	0.7
Total	18,089.8	19,101.6	19,365.4	19,637.3	19,188.4	18,465.9	18,161.8	0.0

Source: BC Stats

Passenger Counts at Regional Airports, 2003

Airport	Passengers (thousands)	% of Regional traffic
Victoria	1,182.9	31
Kelowna	863.6	22
Abbotsford	422.5	11
Prince George	339.8	9
Comox Valley	166.8	4
Kamloops	138.5	4
Nanaimo	113.2	3
Fort St. John	92.1	2
Terrace-Kitimat	89.7	2
Smithers	69.2	2
Cranbrook	64.0	2
Castlegar	61.5	2
Campbell River	61.1	2
Prince Rupert	60.5	2
Powell River	32.1	1
Williams Lake	26.8	1
Fort Nelson	22.5	1
Dawson Creek	17.1	0
Quesnel	16.3	0
Penticton	n/a	
Port Hardy	n/a	
Total	3,842.3	

Table 1: Seasonally Adjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,988	810,298	213,446	72,100	43,064	18,783	8,929	46,006	1,485,616
Quarterly data									
2002 Q4	67,340	212,659	52,624	17,474	11,021	4,509	2,346	9,295	377,268
2003 Q1	68,650	210,767	54,419	18,877	10,383	4,634	2,352	11,536	381,617
2003 Q2	66,734	195,209	52,546	17,576	10,801	4,586	2,189	11,181	360,823
2003 Q3	66,901	199,111	51,077	17,145	10,592	4,749	2,183	11,537	363,294
2003 Q4	70,703	205,212	55,405	18,503	11,288	4,815	2,205	11,752	379,882
Monthly data									
Jan-03	22,676	72,457	18,912	6,169	3,596	1,521	748	3,482	129,560
Feb-03	23,312	73,111	17,963	6,553	3,166	1,521	861	3,642	130,129
Mar-03	22,662	65,198	17,544	6,155	3,621	1,592	743	4,412	121,928
Apr-03	22,702	65,235	17,555	5,998	3,597	1,557	729	3,925	121,299
May-03	22,163	66,667	17,412	5,785	3,568	1,491	744	3,722	121,552
Jun-03	21,870	63,306	17,579	5,793	3,637	1,538	715	3,535	117,972
Jul-03	21,937	64,676	17,141	5,882	3,538	1,561	726	3,884	119,346
Aug-03	22,509	67,526	17,238	5,687	3,552	1,611	727	3,934	122,785
Sep-03	22,455	66,908	16,697	5,576	3,502	1,577	729	3,718	121,163
Oct-03	23,385	67,458	17,827	6,096	3,800	1,560	759	3,785	124,670
Nov-03	23,506	68,377	18,041	5,902	3,698	1,575	716	3,781	125,595
Dec-03	23,813	69,377	19,537	6,505	3,790	1,680	730	4,186	129,618
Jan-04	23,863	67,593	18,742	6,169	3,621	1,651	718	3,819	126,177
Month-over-month growth rates									
Jan-03	-1.6	1.7	7.3	4.6	1.2	8.7	1.3	31.6	2.7
Feb-03	2.8	0.9	-5.0	6.2	-12.0	0.0	15.1	4.6	0.4
Mar-03	-2.8	-10.8	-2.3	-6.1	14.4	4.7	-13.7	21.1	-6.3
Apr-03	0.2	0.1	0.1	-2.5	-0.7	-2.2	-1.8	-11.0	-0.5
May-03	-2.4	2.2	-0.8	-3.6	-0.8	-4.2	2.1	-5.2	0.2
Jun-03	-1.3	-5.0	1.0	0.1	1.9	3.1	-3.9	-5.0	-2.9
Jul-03	0.3	2.2	-2.5	1.5	-2.7	1.5	1.6	9.9	1.2
Aug-03	2.6	4.4	0.6	-3.3	0.4	3.2	0.1	1.3	2.9
Sep-03	-0.2	-0.9	-3.1	-1.9	-1.4	-2.2	0.2	-5.5	-1.3
Oct-03	4.1	0.8	6.8	9.3	8.5	-1.1	4.1	1.8	2.9
Nov-03	0.5	1.4	1.2	-3.2	-2.7	0.9	-5.6	-0.1	0.7
Dec-03	1.3	1.5	8.3	10.2	2.5	6.7	1.9	10.7	3.2
Jan-04	0.2	-2.6	-4.1	-5.2	-4.5	-1.7	-1.6	-8.8	-2.7

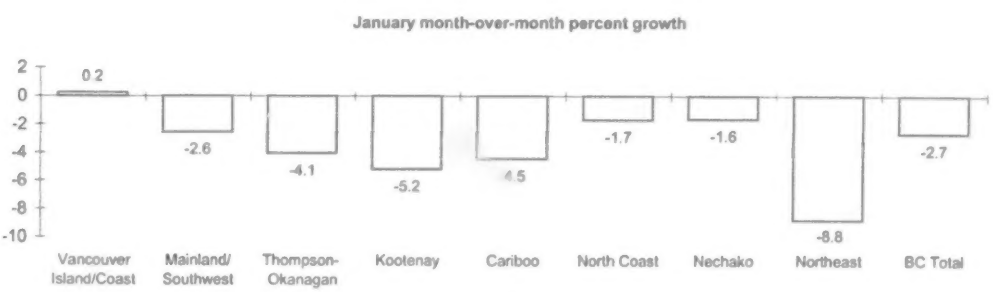


Table 2: Seasonally Adjusted Room Revenue by Accommodation Type ($000)

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous Incl. Fishing Lodges
	251+	151-250	76-150	1-75			
Annual data							
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,238	180,476	119,354	95,422
Quarterly data							
2002 Q4	116,430	46,430	74,267	43,635	44,648	28,819	22,863
2003 Q1	116,517	45,994	74,271	44,157	45,071	30,373	24,919
2003 Q2	103,749	43,502	72,661	43,173	44,645	29,608	22,715
2003 Q3	106,315	44,001	73,742	42,941	43,740	29,099	23,181
2003 Q4	111,311	47,334	76,730	43,966	47,020	30,274	24,607
Monthly data							
Jan-03	41,756	15,638	25,021	15,048	14,899	10,428	8,108
Feb-03	40,290	15,580	25,081	14,863	15,163	10,002	8,592
Mar-03	34,470	14,776	24,168	14,246	15,008	9,943	8,219
Apr-03	35,019	14,850	24,443	14,401	15,002	9,765	7,440
May-03	35,344	14,522	24,049	14,595	14,823	10,048	7,630
Jun-03	33,387	14,129	24,169	14,177	14,819	9,795	7,644
Jul-03	33,891	14,361	24,169	14,239	14,755	9,834	7,675
Aug-03	36,813	14,964	24,848	14,590	14,740	9,816	7,641
Sep-03	35,611	14,676	24,726	14,112	14,245	9,449	7,864
Oct-03	36,514	15,510	25,513	14,887	15,716	9,792	8,012
Nov-03	36,634	15,734	25,756	14,447	15,356	10,132	7,752
Dec-03	38,163	16,090	25,460	14,633	15,948	10,350	8,843
Jan-04	36,615	15,866	25,702	14,492	15,557	9,756	8,209
Month-over-month growth rates							
Jan-03	6.6	-1.2	-0.4	7.4	2.2	11.9	6.2
Feb-03	-3.5	-0.4	0.2	-1.2	1.8	-4.1	6.0
Mar-03	-14.4	-5.2	-3.6	-4.1	-1.0	-0.6	-4.3
Apr-03	1.6	0.5	1.1	1.1	0.0	-1.8	-9.5
May-03	0.9	-2.2	-1.6	1.3	-1.2	2.9	2.6
Jun-03	-5.5	-2.7	0.5	-2.9	0.0	-2.5	0.2
Jul-03	1.5	1.6	0.0	0.4	-0.4	0.4	0.4
Aug-03	8.6	4.2	2.8	2.5	-0.1	-0.2	-0.4
Sep-03	-3.3	-1.9	-0.5	-3.3	-3.4	-3.7	2.9
Oct-03	2.5	5.7	3.2	5.5	10.3	3.6	1.9
Nov-03	0.3	1.4	1.0	-3.0	-2.3	3.5	-3.2
Dec-03	4.2	2.3	-1.1	1.3	3.9	2.2	14.1
Jan-04	-4.1	-1.4	0.9	-1.0	-2.5	-5.7	-7.2

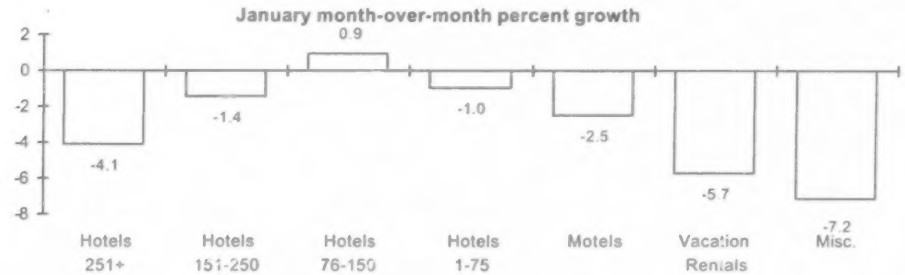


Table 3: Unadjusted Room Revenue by Development Region

Development Region	Revenue				Properties		Rooms	
	($000)		% chg from		(#)	# chg from	(#)	# chg from
	Jan-04	YTD 04	Jan-03	YTD 03	Jan-04	Jan-03	Jan-04	Jan-03
Vancouver Island/Coast								
Total - all accommodation types	**10,210**	**10,210**	**6.8**	**6.8**	**385**	**-5**	**14,809**	**137**
Total - Hotels	6,766	6,766	11.0	11.0	129	-2	8,625	19
76+ Rooms	4,596	4,596	15.3	15.3	39	1	5,138	84
1-75 Rooms	2,170	2,170	2.9	2.9	90	-3	3,487	-65
Motels	1,409	1,409	2.7	2.7	115	1	3,143	91
Vacation Rentals	1,053	1,053	-10.3	-10.3	61	-4	1,244	-2
Mainland/Southwest								
Total - all accommodation types	**58,382**	**58,382**	**-6.2**	**-6.2**	**395**	**-3**	**35,219**	**-499**
Total - Hotels	50,867	50,867	-5.7	-5.7	226	-1	29,846	-389
251+ Rooms	27,029	27,029	-9.5	-9.5	31	-1	12,396	323
151-250 Rooms	8,064	8,064	1.0	1.0	29	0	5,469	3
76-150 Rooms	11,696	11,696	-2.1	-2.1	75	-1	7,974	-79
1-75 Rooms	4,079	4,079	-1.3	-1.3	91	1	4,007	10
Motels	1,345	1,345	4.7	4.7	86	-8	2,825	-167
Vacation Rentals	4,478	4,478	-15.9	-15.9	51	0	1,935	37
Thompson/Okanagan								
Total - all accommodation types	**12,506**	**12,506**	**3.2**	**3.2**	**407**	**2**	**16,123**	**118**
Total - Hotels	6,671	6,671	1.0	1.0	105	-1	7,147	-45
76+ Rooms	4,594	4,594	7.6	7.6	38	0	4,535	-23
1-75 Rooms	2,077	2,077	-11.0	-11.0	67	-1	2,612	-22
Motels	2,084	2,084	11.0	11.0	218	1	6,901	89
Vacation Rentals	2,743	2,743	1.6	1.6	39	0	1,138	42
Kootenay								
Total - all accommodation types	**5,568**	**5,568**	**2.4**	**2.4**	**188**	**-1**	**6,006**	**-129**
Total - Hotels	2,107	2,107	1.2	1.2	45	-1	2,375	3
Motels	832	832	-4.7	-4.7	88	-2	1,927	-54
Vacation Rentals	1,351	1,351	26.7	26.7	25	1	945	18
Cariboo								
Total - all accommodation types	**2,259**	**2,259**	**0.4**	**0.4**	**113**	**-1**	**4,043**	**-165**
Total - Hotels	1,315	1,315	-2.0	-2.0	27	0	1,838	-56
Motels	743	743	5.5	5.5	60	-5	1,908	-130
North Coast								
Total - all accommodation types	**753**	**753**	**9.5**	**9.5**	**52**	**3**	**1,575**	**-7**
Total - Hotels	463	463	17.3	17.3	17	1	892	40
Motels	204	204	15.1	15.1	24	-2	603	-77
Nechako								
Total - all accommodation types	**415**	**415**	**-6.0**	**-6.0**	**39**	**0**	**1,081**	**31**
Motels	242	242	-6.8	-6.8	23	-2	633	-23
Northeast								
Total - all accommodation types	**4,428**	**4,428**	**10.5**	**10.5**	**68**	**5**	**3,111**	**562**
Total - Hotels	2,273	2,273	36.7	36.7	21	2	1,527	191
Motels	914	914	12.2	12.2	32	0	912	11
British Columbia Total								
Total - all accommodation types	**94,521**	**94,521**	**-2.3**	**-2.3**	**1,627**	**0**	**81,967**	**68**
Fishing lodges	147	147	5.4	5.4	24	1	367	2
Total - Hotels	70,577	70,577	-2.3	-2.3	578	-1	52,602	-201
251+ Rooms	28,366	28,366	-8.4	-8.4	34	-1	13,500	-323
151-250 Rooms	11,532	11,532	3.7	3.7	44	0	8,205	3
76-150 Rooms	20,154	20,154	4.3	4.3	167	2	17,322	173
1-75 Rooms	10,525	10,525	-3.1	-3.1	333	-2	13,575	-54
Motels	7,772	7,772	5.6	5.6	646	-15	18,852	-260
Vacation Rentals	10,845	10,845	-8.7	-8.7	202	2	5,959	463
Miscellaneous	5,179	5,179	1.0	1.0	177	13	4,187	64

Table 4: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Jan-04	Revenue ($000) YTD 04	% change from Jan-03	% change from YTD 03	Properties (#) Jan-04	Properties # chg from Jan-03	Rooms (#) Jan-04	Rooms # chg from Jan-03
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	5,567	5,567	11.2	11.2	138	-2	7,802	95
Total - Hotels	4,682	4,682	14.4	14.4	64	0	5,381	68
76+ Rooms	3,644	3,644	18.8	18.8	25	1	3,701	80
1-75 Rooms	1,039	1,039	1.5	1.5	39	-1	1,680	-12
Motels	538	538	6.4	6.4	27	-1	1,050	18
Vacation Rentals	153	153	-23.8	-23.8	18	-1	229	-27
19 Cowichan Valley								
Total - All accommodation types	351	351	17.7	17.7	32	3	634	53
Motels	100	100	65.5	65.5	15	2	296	49
21 Nanaimo								
Total - All accommodation types	1,538	1,538	3.2	3.2	81	1	2,870	96
Total - Hotels	907	907	2.6	2.6	21	1	1,452	37
Motels	281	281	-0.6	-0.6	21	1	575	-2
Vacation Rentals	301	301	5.5	5.5	15	0	529	75
23 Alberni-Clayoquot								
Total - All accommodation types	1,056	1,056	-1.1	-1.1	51	1	1,282	-8
Motels	79	79	-37.2	-37.2	20	0	405	0
25 Comox-Strathcona								
Total - All accommodation types	1,408	1,408	7.5	7.5	48	-6	1,469	-52
Motels	389	389	15.0	15.0	23	-1	642	26
27 Powell River								
Total - All accommodation types	123	123	-27.0	-27.0	15	0	354	0
43 Mount Waddington								
Total - All accommodation types	148	148	-27.0	-27.0	15	-2	509	-49
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	1,461	1,461	-23.8	-23.8	62	0	2,195	-302
Total - Hotels	793	793	-40.3	-40.3	20	0	1,107	-307
Motels	331	331	19.2	19.2	34	0	907	3
15 Greater Vancouver								
Total - All accommodation types	29,725	29,725	2.5	2.5	223	0	25,682	-131
Total - Hotels	28,260	28,260	2.5	2.5	159	-2	23,220	-96
251+ Rooms	14,707	14,707	-2.5	-2.5	25	0	9,956	0
151-250 Rooms	6,037	6,037	10.3	10.3	25	0	4,752	-1
76-150 Rooms	5,560	5,560	5.0	5.0	53	-1	5,768	-79
1-75 Rooms	1,955	1,955	12.3	12.3	56	-1	2,744	-16
Motels	806	806	-3.4	-3.4	35	-3	1,525	-106
Vacation Rentals	492	492	16.2	16.2	15	0	555	30
29 Sunshine Coast								
Total - All accommodation types	149	149	-4.9	-4.9	14	-3	264	-79
31 Squamish-Lillooet								
Total - All accommodation types	27,047	27,047	-13.3	-13.3	96	0	7,158	13
Total - Hotels	21,752	21,752	-12.8	-12.8	44	0	5,436	4
76+ Rooms	19,916	19,916	-12.7	-12.7	25	0	4,676	4
1-75 Rooms	1,836	1,836	-13.6	-13.6	19	0	760	0
Vacation Rentals	3,673	3,673	-20.5	-20.5	26	-1	1,198	1
Miscellaneous	1,499	1,499	-1.2	-1.2	17	1	307	8
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	1,210	1,210	31.4	31.4	86	-2	2,798	-143
Total - Hotels	753	753	15.4	15.4	17	-1	1,173	-101
Motels	288	288	44.1	44.1	59	0	1,479	31
33 Thompson-Nicola								
Total - All accommodation types	3,830	3,830	4.3	4.3	136	1	5,218	88
Total - Hotels	1,502	1,502	4.7	4.7	34	1	2,203	83
76+ Rooms	1,232	1,232	8.4	8.4	12	1	1,389	80
1-75 Rooms	270	270	-9.6	-9.6	22	0	814	3
Motels	691	691	11.4	11.4	75	0	2,263	4
Vacation Rentals	1,374	1,374	1.7	1.7	13	1	465	5

Table 4: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000)		Revenue % change from		Properties (#)	Properties # chg from	Rooms (#)	Rooms # chg from
	Jan-04	YTD 04	Jan-03	YTD 03	Jan-04	Jan-03	Jan-04	Jan-03
35 Central Okanagan								
Total - All accommodation types	3,573	3,573	1.0	1.0	57	-1	3,625	71
Total - Hotels	2,230	2,230	2.4	2.4	21	-1	1,912	-27
Motels	382	382	0.9	0.9	24	0	1,097	-18
37 North Okanagan								
Total - All accommodation types	1,900	1,900	-8.4	-8.4	40	1	1,634	113
Total - Hotels	1,445	1,445	-12.5	-12.5	15	0	824	0
Motels	222	222	31.2	31.2	19	2	642	122
39 Columbia-Shuswap								
Total - All accommodation types	1,993	1,993	3.9	3.9	88	3	2,848	-11
Total - Hotels	741	741	7.8	7.8	18	0	1,035	0
Motels	501	501	-1.9	-1.9	41	-1	1,420	-50
Miscellaneous	679	679	7.3	7.3	24	4	338	39
Kootenay								
01 East Kootenay								
Total - All accommodation types	4,214	4,214	3.0	3.0	94	0	4,048	-64
Total - Hotels	1,458	1,458	2.0	2.0	25	0	1,514	49
Motels	537	537	-0.4	-0.4	42	-1	1,087	-10
Vacation Rentals	1,205	1,205	28.5	28.5	12	0	834	10
03 Central Kootenay								
Total - All accommodation types	918	918	0.4	0.4	61	-3	1,310	-85
Total - Hotels	500	500	3.9	3.9	14	-1	638	-46
Motels	146	146	-22.1	-22.1	25	-2	484	-57
Miscellaneous	219	219	15.2	15.2	11	0	108	17
05 Kootenay Boundary								
Total - All accommodation types	437	437	0.3	0.3	33	2	648	20
Motels	149	149	1.9	1.9	21	1	356	13
Cariboo								
41 Cariboo								
Total - All accommodation types	754	754	6.7	6.7	64	1	1,611	-144
Motels	435	435	11.5	11.5	33	-4	958	-126
Vacation Rentals	22	22	49.5	49.5	11	1	96	2
53 Fraser-Fort George								
Total - All accommodation types	1,504	1,504	-2.5	-2.5	49	-2	2,432	-21
Total - Hotels	1,098	1,098	-3.5	-3.5	17	-1	1,375	-17
Motels	308	308	-1.9	-1.9	27	-1	950	-4
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	330	330	14.3	14.3	28	3	941	53
Motels	79	79	22.7	22.7	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	423	423	6.1	6.1	24	0	634	-60
Motels	125	125	10.7	10.7	13	-2	275	-77
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	415	415	-6.0	-6.0	39	0	1,081	51
Motels	242	242	-6.8	-6.8	23	-2	633	-23
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	4,428	4,428	10.5	10.5	68	5	3,111	562
Total - Hotels	2,273	2,273	36.7	36.7	21	2	1,527	191
Motels	914	914	12.2	12.2	32	0	912	11
Vacation Rentals	1,139	1,139	-24.3	-24.3	12	3	585	360

Table 5: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue ($000)		Revenue % change from		Properties (#)	Properties # chg from	Rooms (#)	Rooms # chg from
	Jan-04	YTD 04	Jan-03	YTD 03	Jan-04	Jan-03	Jan-04	Jan-03
Vancouver Island/Coast	**10,210**	**10,210**	**6.8**	**6.8**	**365**	**-5**	**14,809**	**137**
Victoria (C)	4,596	4,596	14.1	14.1	72	-2	5,352	-78
Other CRD	972	972	-0.7	-0.7	66	0	2,450	173
Nanaimo (C)	987	987	-0.7	-0.7	21	1	1,196	9
Port Alberni (C)	135	135	-9.2	-9.2	11	-1	330	-37
Courtenay (C)	494	494	10.5	10.5	10	0	448	0
Rest of Development Regic	3,027	3,027	2.0	2.0	195	-3	5,033	70
Mainland/Southwest	**58,382**	**58,382**	**-6.2**	**-6.2**	**395**	**-3**	**35,219**	**-499**
Downtown Vancouver (C)	17,112	17,112	3.1	3.1	87	2	13,120	176
Other Vancouver (C)	1,336	1,336	-9.4	-9.4	30	-2	2,567	-185
Richmond (C)	6,388	6,388	5.8	5.8	23	0	4,321	5
Burnaby (C)	1,333	1,333	-2.7	-2.7	10	-17	1,115	67
Other GVRD	3,556	3,556	1.1	1.1	73	0	4,479	-36
Whistler (DM)	26,534	26,534	-13.2	-13.2	73	0	6,579	13
Rest of Development Regic	2,123	2,123	-21.2	-21.2	99	14	3,038	-539
Thompson/Okanagan	**12,506**	**12,506**	**3.2**	**3.2**	**407**	**2**	**16,123**	**118**
Penticton (C)	859	859	38.8	38.8	40	-3	1,713	-102
Kamloops (C)	3,235	3,235	3.9	3.9	62	0	3,539	88
Kelowna (C)	3,289	3,289	-3.0	-3.0	46	-1	3,037	-80
Vernon (C)	1,871	1,871	-8.5	-8.5	33	2	1,510	122
Revelstoke (C)	1,019	1,019	-0.3	-0.3	25	-2	988	-60
Rest of Development Regic	2,233	2,233	15.7	15.7	201	6	5,336	150
Kootenay	**5,568**	**5,568**	**2.4**	**2.4**	**188**	**-1**	**6,006**	**-129**
Cranbrook (C)	394	394	1.4	1.4	17	0	794	0
Rest of Development Regic	5,174	5,174	2.5	2.5	171	-1	5,212	-129
Cariboo	**2,259**	**2,259**	**0.4**	**0.4**	**113**	**-1**	**4,043**	**165**
Quesnel (C)	197	197	34.0	34.0	13	1	452	7
Williams Lake (C)	211	211	0.4	0.4	10	-1	479	-89
Prince George (C)	1,139	1,139	-1.6	-1.6	27	-1	1,688	-4
Rest of Development Regic	712	712	-3.2	-3.2	63	0	1,424	-79
North Coast	**753**	**753**	**9.5**	**9.5**	**52**	**3**	**1,575**	**-7**
Prince Rupert (C)	273	273	15.9	15.9	15	1	761	40
Rest of Development Regic	215	215	-17.2	-17.2	28	2	503	-24
Nechako	**415**	**415**	**-6.0**	**-6.0**	**39**	**0**	**1,081**	**51**
Smithers (T)	177	177	-13.0	-13.0	11	-1	393	-17
Rest of Development Regic	238	238	0.0	0.0	28	1	688	278
Northeast	**4,428**	**4,428**	**10.5**	**10.5**	**68**	**5**	**3,111**	**562**
Dawson Creek (C)	443	443	25.2	25.2	14	-1	488	-11
Fort St. John (C)	1,888	1,888	27.0	27.0	21	1	1,225	93
Rest of Development Regic	2,097	2,097	-3.3	-3.3	33	5	1,398	480

Table 6: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,988	810,298	213,446	72,100	43,064	18,783	8,929	46,006	1,485,616
Quarterly data									
2002 Q4	41,750	156,673	31,188	10,869	8,420	2,666	2,056	7,911	261,533
2003 Q1	39,094	208,010	40,408	20,482	7,500	2,671	1,579	15,935	335,678
2003 Q2	71,705	189,501	49,635	14,655	11,457	4,898	2,104	8,831	352,787
2003 Q3	117,765	259,899	89,912	25,224	15,512	8,401	3,291	11,276	531,281
2003 Q4	44,424	152,888	33,491	11,740	8,595	2,813	1,955	9,965	265,870
Monthly data									
Jan-03	9,564	62,257	12,122	5,439	2,250	688	442	4,008	96,769
Feb-03	12,874	72,408	13,523	7,301	2,260	928	534	5,071	114,899
Mar-03	16,656	73,344	14,763	7,743	2,990	1,057	603	6,855	124,010
Apr-03	18,409	55,669	11,893	4,344	3,192	946	510	3,493	98,456
May-03	24,464	64,094	16,335	4,681	3,780	1,393	666	2,452	117,866
Jun-03	28,832	69,739	21,407	5,630	4,485	2,559	928	2,885	136,465
Jul-03	39,350	86,148	32,863	8,643	5,169	3,058	1,058	3,762	180,052
Aug-03	47,004	101,199	37,026	9,969	5,569	3,057	1,142	3,978	208,944
Sep-03	31,412	72,552	20,022	6,613	4,774	2,285	1,091	3,536	142,285
Oct-03	19,909	52,270	13,801	4,244	3,775	1,162	963	3,455	99,579
Nov-03	12,752	41,418	8,039	2,484	2,622	860	538	2,967	71,681
Dec-03	11,763	59,199	11,652	5,012	2,199	790	454	3,543	94,611
Jan-04	10,210	58,382	12,506	5,568	2,259	753	415	4,428	94,521
Year-over-year percent changes									
Jan-03	6.6	10.5	16.1	4.4	-11.1	-4.6	7.1	-0.3	9.2
Feb-03	3.3	5.6	8.8	8.8	-18.1	-7.1	24.2	3.9	5.2
Mar-03	0.5	-8.6	3.9	3.0	-0.6	-2.5	-6.8	61.2	-2.8
Apr-03	2.2	-11.6	9.2	2.2	5.8	0.5	3.6	5.2	-5.2
May-03	-1.1	-4.1	6.3	-2.7	-4.0	-9.2	9.4	28.6	-1.6
Jun-03	-3.2	-15.3	6.0	-3.2	-0.8	-1.6	-0.6	16.8	-8.2
Jul-03	-0.6	-10.2	1.7	3.0	-0.5	-1.2	0.4	38.1	-4.4
Aug-03	2.5	-3.6	-1.0	-8.9	-6.7	1.1	3.3	31.1	-1.6
Sep-03	2.3	-3.8	-4.5	-8.2	-7.4	-2.9	-1.1	4.5	-2.7
Oct-03	7.0	-5.8	3.1	7.1	1.4	1.3	-6.5	8.4	-1.0
Nov-03	7.1	-0.9	7.6	0.0	-0.5	-0.6	-8.1	18.7	2.0
Dec-03	4.6	-0.3	12.7	13.3	6.6	20.9	3.0	59.2	4.3
Jan-04	6.8	-6.2	3.2	2.4	0.4	9.5	-6.0	10.5	-2.3

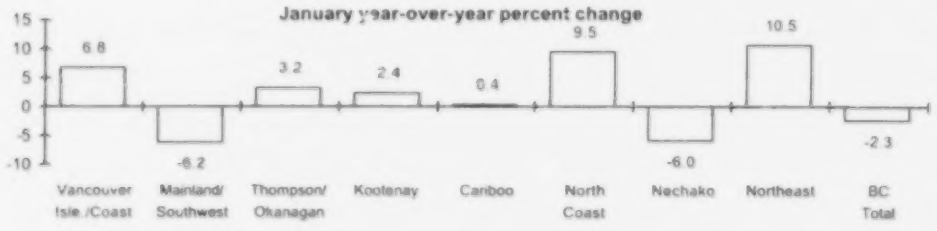


Table 7: Traveller Entries to Canada via BC, Unadjusted (000s)

Period	International								Canadian		
	Total	USA			Overseas				Total	USA same-day auto	Overseas
		Total	Same-day	Overnight	Total	Asia	Europe	Oceania*			
Annual data											
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0	9,588.1	5,813.1	798.7
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8	9,435.2	5,639.0	866.4
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9	8,328.6	4,720.3	902.8
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0	7,197.3	3,586.6	927.5
2003	7,335.3	6,137.4	2,627.8	3,509.7	1,197.8	577.6	410.1	124.8	7,285.2	3,744.3	941.8
Quarterly data											
2002 Q4	1,462.4	1,211.8	582.3	629.6	250.6	149.3	63.4	24.4	1,576.4	827.8	208.1
2003 Q1	1,330.4	1,115.7	520.0	595.7	214.7	116.6	63.4	24.3	1,608.4	779.3	299.6
2003 Q2	1,843.4	1,561.8	683.8	878.0	281.6	110.0	114.1	35.8	1,730.4	921.6	177.8
2003 Q3	2,833.6	2,361.5	902.5	1,458.9	472.1	217.4	173.0	41.7	2,309.5	1,170.6	227.4
2003 Q4	1,327.9	1,098.5	521.4	577.1	229.4	133.4	59.6	23.0	1,636.9	872.7	237.0
Monthly data											
Feb-03	444.1	377.0	166.9	210.1	67.1	35.0	22.1	6.9	483.5	246.3	83.3
Mar-03	448.8	374.1	171.0	203.1	74.6	42.5	23.3	5.6	589.7	277.2	105.9
Apr-03	448.3	378.5	183.1	195.4	69.9	31.9	25.0	6.1	516.7	267.6	67.6
May-03	611.3	521.4	234.8	286.6	89.9	31.1	38.7	14.4	602.1	318.3	57.1
Jun-03	783.8	661.9	266.0	395.9	121.9	47.0	50.4	15.2	611.6	335.7	53.1
Jul-03	1,024.8	861.4	313.1	548.3	163.4	71.0	61.4	13.2	772.3	398.5	64.2
Aug-03	1,118.8	947.5	339.6	607.9	171.2	81.7	62.8	13.7	903.9	446.4	95.2
Sep-03	690.0	552.5	249.9	302.7	137.5	64.8	48.9	14.9	633.3	325.7	68.1
Oct-03	454.2	371.7	179.8	191.9	82.5	52.0	21.9	5.5	560.6	302.6	71.2
Nov-03	393.2	333.5	173.4	160.1	59.7	36.4	14.4	5.3	548.0	293.3	78.4
Dec-03	480.5	393.3	168.3	225.0	87.2	45.0	23.2	12.3	528.4	276.9	87.4
Jan-04	387.0	314.2	152.9	161.4	72.8	40.0	18.8	11.6	536.6	260.1	112.0
Feb-04	427.5	356.1	160.5	195.6	71.4	38.5	21.7	7.3	559.2	290.5	90.0
Year-over-year percent changes											
Feb-03	-3.4	-3.0	-4.2	-2.0	-5.9	-14.3	4.3	6.4	5.2	8.4	7.6
Mar-03	-11.7	-10.7	-9.9	-11.4	-16.2	-12.5	-13.4	-18.2	-1.1	-1.3	11.4
Apr-03	-10.9	-9.2	-9.1	-9.3	-19.1	-42.1	14.0	0.9	-13.7	-12.2	-21.8
May-03	-13.9	-10.3	-10.2	-10.4	-29.9	-56.1	0.9	16.7	-5.2	-0.7	-23.7
Jun-03	-13.0	-11.5	-12.5	-10.8	-20.4	-41.4	-2.1	16.7	-1.9	0.1	-18.6
Jul-03	-7.7	-5.9	-3.8	-7.1	-15.9	-32.3	1.9	-0.9	1.7	6.7	-1.0
Aug-03	-3.9	-3.3	-0.2	-5.0	-6.7	-15.2	2.8	3.4	8.8	13.9	7.6
Sep-03	-7.5	-7.2	-5.6	-8.4	-8.8	-18.4	-1.7	8.5	1.3	7.1	6.2
Oct-03	-9.7	-8.6	-7.7	-9.5	-14.6	-18.2	-3.8	-12.1	0.0	4.0	12.3
Nov-03	-10.4	-10.7	-11.8	-9.6	-8.7	-9.4	-12.0	-8.3	8.1	8.5	15.9
Dec-03	-7.6	-8.9	-11.9	-6.4	-1.5	-1.0	-4.0	-1.4	3.8	3.8	13.4
Jan-04	-11.5	-13.8	-16.0	-11.6	-0.2	2.2	-6.0	-2.4	0.3	1.7	1.4
Feb-04	-3.7	-5.5	-3.8	-6.9	6.4	10.0	-2.0	5.7	15.7	17.9	8.0

* Australia, New Zealand, and other South Pacific nations
SOURCE: Statistics Canada

Table 8: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International								Canadian		
	Total	USA			Overseas				Total	USA same-day auto	Overseas
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**			
Annual data											
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0	9,588.1	5,813.1	798.7
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8	9,435.2	5,639.0	866.4
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9	8,328.6	4,720.3	902.8
2002	7,960.1	6,583.2	2,808.1	3,787.8	1,376.9	764.0	411.8	118.0	7,187.8	3,582.5	924.9
2003	7,328.1	6,124.0	2,627.8	3,509.7	1,204.0	577.6	410.1	124.8	7,285.0	3,745.4	940.0
Quarterly data											
2002 Q4	2,057.9	1,695.5	728.0	963.1	362.4	197.8	109.3	32.5	1,881.8	975.9	238.4
2003 Q1	1,885.5	1,569.6	676.9	909.4	315.9	160.7	105.0	30.9	1,790.8	913.2	235.3
2003 Q2	1,758.1	1,490.6	632.2	856.5	267.5	99.2	101.9	31.1	1,674.6	850.2	197.4
2003 Q3	1,853.1	1,550.6	669.0	878.5	302.5	145.8	100.9	31.8	1,876.7	963.8	241.2
2003 Q4	1,831.4	1,513.2	649.6	865.3	318.2	171.8	102.2	31.1	1,942.9	1,018.2	266.1
Monthly data											
Feb-03	630.6	526.2	224.6	306.6	104.4	52.0	35.3	10.3	303.3	309.2	77.7
Mar-03	593.8	495.1	204.8	288.5	98.8	51.8	33.7	8.6	575.3	288.1	80.2
Apr-03	585.0	494.7	209.4	283.8	90.3	36.6	35.2	9.2	519.0	259.0	65.8
May-03	576.9	492.3	210.0	282.7	84.7	27.6	33.6	10.8	564.8	292.9	61.1
Jun-03	596.2	503.6	212.8	290.0	92.6	35.0	33.1	11.0	590.8	298.3	70.5
Jul-03	608.4	512.2	219.5	291.3	96.2	41.3	33.5	10.3	607.1	305.6	77.8
Aug-03	625.5	522.7	224.8	296.2	102.8	51.2	33.8	10.6	635.4	326.9	82.2
Sep-03	619.2	515.7	224.8	291.0	103.4	53.3	33.6	10.8	634.2	331.3	81.3
Oct-03	614.5	509.1	221.9	291.3	105.5	58.3	33.8	9.8	627.3	331.8	85.6
Nov-03	607.0	501.5	214.0	286.5	105.4	57.0	34.3	10.4	659.9	346.7	91.5
Dec-03	609.9	502.6	213.7	287.5	107.3	56.5	34.1	10.8	655.8	339.8	88.9
Jan-04	591.4	484.1	206.5	276.4	107.2	57.0	33.8	11.5	611.3	323.0	77.2
Feb-04	592.0	484.6	207.7	275.1	107.4	54.3	34.2	11.0	660.4	346.0	81.7
Month-over-month percent changes											
Feb-03	-4.6	-4.0	-9.2	-2.5	-7.4	-8.6	-1.9	-14.4	-1.4	-2.1	0.5
Mar-03	-5.8	-5.9	-8.8	-5.9	-5.4	-0.5	-4.6	-16.0	-4.6	-6.8	3.1
Apr-03	-1.5	-0.1	2.2	-1.6	-8.6	-29.3	4.4	7.3	-9.8	-10.1	-18.0
May-03	-1.4	-0.5	0.3	-0.4	-6.2	-24.5	-4.5	17.0	8.8	13.1	-7.0
Jun-03	3.3	2.3	1.3	2.6	9.4	26.7	-1.4	1.8	4.6	1.8	15.4
Jul-03	2.1	1.7	3.1	0.4	3.9	17.9	1.0	-6.1	2.8	2.4	10.2
Aug-03	2.8	2.1	2.5	1.7	6.9	24.1	1.1	2.9	4.7	7.0	5.7
Sep-03	-1.0	-1.3	0.0	-1.7	0.6	4.1	-0.5	1.7	-0.2	1.4	-1.0
Oct-03	-0.8	-1.3	-1.3	0.1	1.9	9.2	0.5	-9.1	-1.1	0.1	5.3
Nov-03	-1.2	-1.5	-3.5	-1.6	0.0	-2.3	1.4	5.5	5.2	4.5	6.8
Dec-03	0.5	0.2	-0.1	0.3	1.8	-0.8	-0.5	4.3	-0.6	-2.0	-2.8
Jan-04	-3.0	-3.7	-3.4	-3.9	-0.1	0.8	-1.0	6.4	-6.8	-4.9	-13.2
Feb-04	0.1	0.1	0.6	-0.5	0.2	-4.6	1.4	-4.2	8.0	7.1	5.9

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 9: Transportation Indicators (Historical)

Period	Air Passenger Traffic (000s)								Other Transportation (000s)		
	Vancouver				Victoria	Kelowna	Prince George	Comox Valley	BC Ferries		Coquihalla Hwy
	Total	Domestic	Trans-border	Other Int'l.	Total	Total	Total	Total	Vehicles	Passengers	Passenger Vehicles
Annual data											
1999	15,806	8,314	4,120	3,372	1,191.4	815.1	352.2	62.8	7,852	21,369	2,378
2000	16,033	8,306	4,074	3,652	1,139.2	835.9	392.9	72.6	7,887	21,280	2,389
2001	15,477	7,869	4,000	3,608	1,158.2	850.3	361.9	132.1	8,104	21,309	2,449
2002	14,878	7,422	3,855	3,600	1,102.2	836.9	325.4	148.7	8,272	21,540	2,518
2003	14,322	7,267	3,814	3,241	1,182.9	863.6	339.8	166.8	8,263	21,339	2,466
Quarterly data											
2002 Q4	3,319	1,747	780	793	263.9	207.8	89.1	34.7	1,860	4,627	480
2003 Q1	3,308	1,621	883	803	258.1	220.8	85.2	32.2	1,655	4,030	358
2003 Q2	3,285	1,723	909	652	289.1	193.9	82.6	38.1	2,113	5,388	679
2003 Q3	4,393	2,136	1,256	1,001	331.8	227.5	83.4	54.6	2,710	7,535	970
2003 Q4	3,336	1,786	766	784	303.9	221.5	88.6	41.8	1,785	4,386	459
Monthly data											
Feb-03	1,030	513	277	240	84.1	69.8	27.5	10.1	519	1,244	113
Mar-03	1,159	570	314	274	95.2	78.3	30.6	11.9	614	1,533	142
Apr-03	970	522	244	203	94.3	63.1	27.0	12.3	646	1,608	191
May-03	1,083	584	299	200	98.9	65.9	29.3	12.5	714	1,827	232
Jun-03	1,232	618	366	249	95.9	64.9	26.3	13.3	753	1,953	257
Jul-03	1,483	715	453	314	109.8	78.6	27.2	19.1	930	2,618	356
Aug-03	1,641	784	482	375	121.8	84.0	29.2	20.4	1,032	3,032	388
Sep-03	1,269	636	321	312	100.2	64.9	27.0	15.2	748	1,885	226
Oct-03	1,161	636	248	276	110.5	70.4	29.9	14.3	672	1,657	209
Nov-03	985	524	233	229	88.6	66.0	27.3	11.2	570	1,358	112
Dec-03	1,191	626	285	279	104.8	85.0	31.4	16.4	543	1,371	138
Jan-04	1,136	552	289	295	88.6	77.1	26.6	12.3	498	1,193	96
Feb-04	1,111	571	286	255	93.7	77.9	27.3	12.5	547	1,301	117
Year-over-year percent changes											
Feb-03	-0.6	-1.0	2.0	-2.9	7.4	2.0	13.0	-1.6	4.2	4.0	7.8
Mar-03	-1.4	-2.4	4.6	-5.5	0.2	5.0	18.3	3.6	0.8	-1.6	-11.9
Apr-03	-13.6	-10.8	-8.1	-25.1	-0.8	-0.6	6.9	10.1	1.1	2.8	12.5
May-03	-13.2	-9.3	-2.7	-32.5	0.3	-1.0	6.8	-0.4	-2.5	-3.1	-0.4
Jun-03	-9.8	-5.7	-4.4	-24.4	0.6	-0.5	-2.3	8.2	0.3	-1.7	4.3
Jul-03	-4.5	-0.4	-2.8	-14.4	11.9	5.0	-0.7	19.4	1.0	-0.5	-1.4
Aug-03	-1.2	-0.7	2.7	-6.6	9.8	0.5	6.6	14.9	1.9	1.9	-6.5
Sep-03	-3.0	-0.9	-3.4	-6.7	10.8	-0.7	3.2	20.8	-0.5	-2.2	-9.7
Oct-03	-3.1	-0.8	-5.7	-5.9	15.5	1.1	0.9	16.2	0.7	-0.8	3.1
Nov-03	2.2	3.3	2.4	-0.2	13.7	9.6	-3.2	20.7	-0.7	-1.9	-11.2
Dec-03	2.8	4.6	-1.5	3.4	16.1	9.1	0.3	24.7	-12.3	-12.8	-8.8
Jan-04	1.5	2.7	-1.1	2.0	12.4	5.9	-1.7	19.9	-4.6	-4.8	-6.8
Feb-04	7.9	11.2	3.1	6.3	11.4	11.6	-0.7	23.9	5.4	4.6	3.7

Table 10: Tourism Sector Indicators

Period	Employment (000s) [1]						Hotel Industry [2]		Consumer Price Index [1]	
	BC Total	Key industries in tourism sector								
	Industrial aggregate	Air transport	Heritage Institutions	Accom-modation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) [3]	Room Rate ($)	Traveller accom-modation	Restaurant food
Annual data										
1999	1,511.5	15.3	2.3	29.2	110.1	24.7	61.7	112.02	133.1	115.6
2000	1,571.8	14.8	2.3	28.2	116.7	26.5	60.0	114.04	139.4	117.6
2001	1,593.1	13.5	2.4	29.5	117.8	27.4	59.3	116.12	133.4	121.3
2002	1,610.2	12.2	2.5	29.2	118.1	28.8	58.9	116.99	124.2	125.4
2003	1,636.8	12.7	2.8	29.0	117.7	30.6	58.3	114.57	111.8	127.6
Quarterly data										
2002 Q4	1,628.9	12.6	2.6	28.2	117.9	28.9	48.0	103.00	108.3	126.3
2003 Q1	1,612.4	12.8	2.5	26.9	114.0	29.8	51.8	115.88	104.8	126.9
2003 Q2	1,655.1	13.1	2.8	29.4	118.8	32.5	59.4	113.68	116.1	126.9
2003 Q3	1,637.3	12.7	3.1	32.0	120.6	31.4	72.3	127.13	127.5	128.1
2003 Q4	1,642.4	12.4	2.9	27.6	117.5	28.7	49.6	101.59	99.0	128.5
Monthly data										
Feb-03	1,612.5	12.7	2.5	26.5	113.1	29.3	54.3	118.82	106.3	127.0
Mar-03	1,622.5	13.2	2.4	26.4	114.4	30.5	56.9	113.91	104.1	126.9
Apr-03	1,635.8	13.0	2.8	27.7	117.0	32.2	55.6	104.95	105.8	126.8
May-03	1,654.5	13.1	2.7	29.5	119.8	32.5	60.0	113.92	118.1	126.9
Jun-03	1,674.9	13.1	3.1	30.9	119.7	32.9	62.6	122.17	124.3	127.1
Jul-03	1,634.2	12.9	3.2	32.0	122.4	31.9	71.1	130.51	129.8	127.8
Aug-03	1,635.6	12.6	3.2	33.2	122.0	31.9	79.5	131.13	131.0	128.3
Sep-03	1,642.0	12.7	2.9	30.9	117.5	30.4	66.2	119.75	121.7	128.2
Oct-03	1,652.3	12.5	2.9	29.2	118.2	28.9	56.8	100.28	110.0	128.3
Nov-03	1,634.2	12.4	2.8	27.1	116.3	28.1	48.0	91.15	94.6	128.6
Dec-03	1,640.6	12.3	2.9	26.3	117.9	29.2	44.0	113.34	92.4	128.5
Jan-04	1,614.4	12.4	2.9	25.4	117.7	30.3	45.6	112.35	90.0	129.1
Feb-04	1,615.7	12.9	2.7	24.9	113.5	30.3	55.7	115.35	91.5	129.2
Year-over-year percent changes										
Feb-03	2.7	8.9	3.0	-3.1	2.3	6.8	0.1	0.5	-7.5	2.1
Mar-03	2.5	12.5	1.9	-3.9	1.9	10.5	-0.6	-4.8	-8.0	1.8
Apr-03	2.5	7.5	18.0	-1.0	0.1	14.7	-2.9	-2.4	-7.2	1.6
May-03	2.5	7.6	4.2	0.6	-1.5	12.5	-1.4	-1.5	-11.6	1.8
Jun-03	2.4	10.1	20.8	-1.7	-2.3	10.8	-4.6	-6.0	-12.6	1.5
Jul-03	1.2	2.5	22.5	0.1	-0.3	5.4	-2.9	-3.6	-13.4	1.8
Aug-03	1.2	0.4	21.3	2.4	-0.7	5.5	-0.5	-3.4	-12.0	1.8
Sep-03	0.2	1.8	10.1	3.3	-3.1	3.1	-1.0	-1.1	-11.9	1.7
Oct-03	0.8	1.1	10.6	-0.9	-2.6	-1.7	0.5	-0.9	-5.1	1.7
Nov-03	0.3	-0.7	10.7	-2.7	-0.2	-1.0	2.4	-1.9	-10.2	1.9
Dec-03	1.4	-5.3	10.3	-3.3	1.8	0.5	1.8	-1.4	-10.9	1.4
Jan-04	0.8	-0.8	18.9	-8.4	2.8	2.5	1.5	-2.2	-13.5	1.7
Feb-04	0.2	1.3	11.0	-5.7	0.3	3.6	1.4	-2.9	-13.9	1.7

[1]Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours)

[2]Source: Pannell Kerr Forster

[3]Occupancy Rate change expressed as percentage point change

Table 11: BC Restaurant and Tavern Receipts

Period	Restaurants and Taverns [1]						
	BC	Receipts ($ million)					
	Total [2] locations	Total	Full service	Limited service	Food service contractors	Social & mobile caterers	Drinking places
Annual data							
1999	8,606	4,467.5	2,188.8	1,616.5	214.3	78.2	369.8
2000	9,060	4,831.5	2,482.6	1,640.1	256.5	93.4	358.9
2001	8,706	5,176.3	2,762.5	1,690.1	274.1	91.6	357.9
2002	8,083	5,101.2	2,728.3	1,720.2	254.3	92.6	305.9
2003	8,231	5,388.8	2,912.4	1,871.3	238.2	82.4	284.4
Quarterly data							
2002 Q4	8,079	1,241.3	650.0	442.2	61.1	18.7	69.3
2003 Q1	8,278	1,225.7	660.6	411.5	71.8	14.3	67.6
2003 Q2	8,046	1,303.2	702.5	461.9	47.2	15.4	76.2
2003 Q3	8,168	1,486.4	820.7	504.5	57.9	27.0	76.2
2003 Q4	8,433	1,373.5	728.5	493.5	61.3	25.7	64.5
Monthly data							
Feb-03	8,320	388.9	209.7	129.5	22.2	5.3	22.1
Mar-03	8,193	432.7	233.7	145.5	24.8	4.8	23.9
Apr-03	8,137	417.9	220.1	151.7	15.5	4.4	26.1
May-03	7,997	438.8	236.4	156.6	15.2	5.4	25.1
Jun-03	8,004	446.6	246.0	153.6	16.5	5.6	25.0
Jul-03	8,043	496.6	271.1	174.7	17.7	5.9	27.2
Aug-03	8,184	530.2	297.3	176.9	19.5	9.9	26.7
Sep-03	8,276	459.5	252.4	152.9	20.7	11.2	22.3
Oct-03	8,290	453.5	240.6	162.1	20.6	8.2	22.0
Nov-03	8,544	448.0	229.6	171.6	18.9	7.2	20.6
Dec-03	8,465	472.0	258.3	159.9	21.8	10.2	21.9
Jan-04	-	-	-	-	-	-	-
Feb-04	-	-	-	-	-	-	-
Year-over-year percent changes							
Feb-03	0.0	-1.8	-0.6	2.2	-10.6	-33.2	-14.0
Mar-03	-1.0	-0.1	0.2	5.3	-1.3	-32.2	-19.1
Apr-03	0.7	0.3	-0.3	7.4	-21.5	-46.6	-0.6
May-03	0.2	0.6	2.8	5.0	-18.9	-55.5	-4.1
Jun-03	0.8	0.8	2.7	5.4	-17.2	-55.9	-1.9
Jul-03	1.3	8.1	7.4	13.5	-10.7	-0.1	0.1
Aug-03	2.1	11.3	11.6	12.5	-0.6	63.8	-2.2
Sep-03	3.8	10.7	13.9	9.1	-5.4	62.8	-9.3
Oct-03	4.3	13.1	19.6	8.8	-2.6	33.4	-7.2
Nov-03	5.3	8.5	5.0	17.3	-3.2	39.2	-10.7
Dec-03	3.6	10.4	12.3	8.7	6.5	38.7	-2.8
Jan-04	-	-	-	-	-	-	-
Feb-04	-	-	-	-	-	-	-

[1]Source: Statistics Canada

[2]The number of locations (physical place in which business activity is conducted) operated in BC during the reporting month.

Note: with the change to NAICS (North American Industry Classification System) coding, many of the series are not available prior to January 1999.

Table 12: BC Restaurant and Tavern Receipts Seasonally Adjusted

Period	Restaurants and Taverns [1]					
	Receipts ($ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
Annual data						
1999	4,467.5	369.8	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
2003	5,388.8	284.4	5,104.3	33,648.9	2,089.1	31,559.8
Quarterly data						
2002 Q4	1,301	74	1,228	8,428	563	7,866
2003 Q1	1,279	71	1,207	8,265	532	7,734
2003 Q2	1,291	72	1,219	8,267	527	7,741
2003 Q3	1,382	71	1,311	8,442	523	7,919
2003 Q4	1,437	69	1,367	8,674	507	8,167
Monthly data						
Feb-03	426	24	402	2,757	178	2,578
Mar-03	426	23	403	2,767	178	2,588
Apr-03	430	25	405	2,722	179	2,543
May-03	431	24	407	2,770	173	2,597
Jun-03	431	24	406	2,775	175	2,600
Jul-03	453	24	428	2,792	182	2,610
Aug-03	463	24	439	2,821	174	2,647
Sep-03	466	23	444	2,829	168	2,661
Oct-03	473	22	451	2,871	169	2,702
Nov-03	481	23	458	2,897	170	2,727
Dec-03	483	24	459	2,906	168	2,738
Jan-04	-	-	-	-	-	-
Feb-04	-	-	-	-	-	-
Month-over-month percent changes						
Feb-03	-0.3	-0.9	-0.3	0.5	1.9	0.4
Mar-03	0.0	-3.8	0.2	0.4	-0.2	0.4
Apr-03	1.0	6.5	0.7	-1.6	0.4	-1.8
May-03	0.2	-3.9	0.4	1.8	-3.4	2.1
Jun-03	0.0	1.8	-0.2	0.2	1.3	0.1
Jul-03	5.2	1.0	5.4	0.6	3.8	0.4
Aug-03	2.3	-1.0	2.5	1.1	-4.2	1.4
Sep-03	0.7	-5.3	1.0	0.3	-3.6	0.5
Oct-03	1.4	-3.4	1.7	1.5	0.6	1.5
Nov-03	1.6	3.6	1.5	0.9	0.9	0.9
Dec-03	0.5	5.6	0.2	0.3	-1.3	0.4
Jan-04	-	-	-	-	-	-
Feb-04	-	-	-	-	-	-

[1]Source: Statistics Canada

Note: with the change to NAICS (North American Industry Classification System) coding, many of the series are not available prior to January 1999.

BC STATS
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Tourism Sector Monitor ◆ May 2004

Room Revenue

Room revenues in BC were essentially unchanged (-0.3% seasonally adjusted) in February.

Revenues were down sharply on Vancouver Island (-4.2%). This is a reversal from last month, when the region was the only area posting significant growth. Elsewhere, Thompson Okanagan (-0.7%) and North Coast (-1.9%) also saw modest declines in revenues.

Room revenues show little change

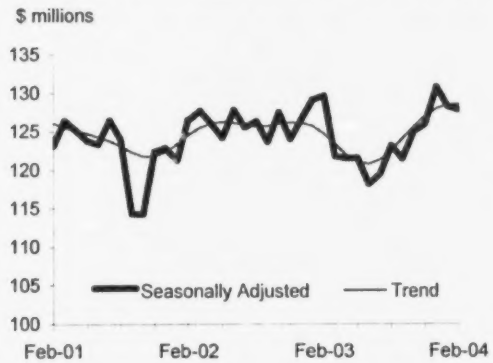


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	Feb.04 ($000)	Jan.04 ($000)	% change
Total	127,718	128,143	-0.3
Hotels	92,229	93,502	-1.4
Motels	15,655	15,557	+0.6
Other Acc.	18,203	18,116	+0.5
Regions (Top 3 performers)			
Northeast	4,318	3,894	+10.9
Cariboo	3,651	3,564	+2.4
Kootenay	6,461	6,374	+1.4

In Mainland/Southwest, revenues were flat (+0.3%). The regions of Kootenay (1.4%), Cariboo (+2.4%), and Northeast (+10.9%) had revenue growth, but not enough to offset the decline on Vancouver Island.

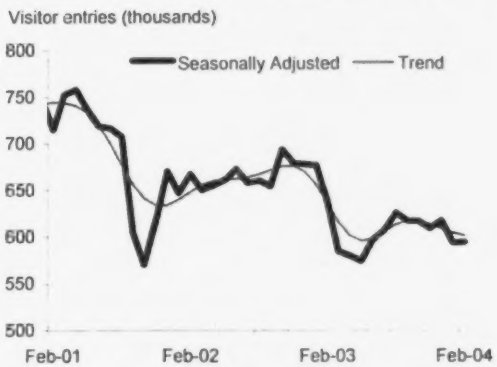
Hotels, regardless of size, saw slower business in February (-1.4%). Revenues at motels (+0.6%) and at other accommodation types (+0.5%) inched up marginally.

Visitor Entries

As with room revenues, the volume of travellers entering Canada via BC was unchanged (+0.1% seasonally adjusted) in February. Both entries from the US (+0.1%) and overseas (+0.2%) were stable.

This continues the pattern of general weakness in traveller entries. There has not been significant growth in the number of visitors in six months.

Visitor entries hold steady



Entries from Asia were down 2.3%, the fourth month of a generally downward slide. Slight growth in entries from Europe (+1.4%) and elsewhere offset weakness in the Asian market.

Special Focus Article: *BC's Hotel Industry: Towards a New Business Model?*

Table 2. Traveller Entries
(seasonally adjusted)

	Feb-04 ('000)	Jan-04 ('000)	% chg from Jan-04
American visitors			
Total	485	484	0.1
Same-day	208	207	0.4
Overnight	280	280	-0.2
Overseas visitors			
Total	107	107	0.2
Europe	34	34	1.4
UK	16	17	-5.5
Asia	55	57	-2.3
Japan	22	19	16.6
Taiwan	7	7	0.8
Oceania	11	11	-4.0

(BC STATS & Statistics Canada)

note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

Weak demand in the tourism sector continues to put downward pressure on prices. The consumer price index for traveller accommodation fell 1.4%(seasonally adjusted) in February, and was down 13.9% from February of last year.

In the hotel industry specifically, room prices edged down 1.1% and occupancy dropped 2.2 percentage points (seasonally adjusted). Indeed, hotels took the brunt of the decline in room revenues.

Employment in the key tourism-related industries dropped 2.4% (seasonally adjusted), led by declines in food & beverage services (-3.6%) and accommodation (-1.0%).

In contrast to room revenues and visitor entries, transportation indicators were relatively strong in February. Passenger traffic rose 3.0% at the Vancouver Airport.

Passenger vehicle traffic over the Coquihalla highway was up 6.2%, which no doubt helped boost room revenues in the Cariboo region (+2.4%).

There was strong growth of passengers (+3.6%) and vehicles (+4.4%) (seasonally adjusted) aboard BC Ferries, and passengers at the Victoria airport were up 1.4%. In spite of this, tourism room revenues on Vancouver Island were down significantly.

The Canadian dollar depreciated roughly two cents against both the US dollar and the British pound in February. The dollar also fell in value next to the Japanese yen and the Australian dollar. The drop in the dollar effectively makes travel in Canada less expensive for tourists from those countries, and should help stimulate BC's tourism economy.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Total	Change from month ago
Hotel Industry		
Occupancy rate	58.7	-2.2 pp
Average room charge *(Pannell Kerr Forster)*	112.40	-1.1%
Airport Passengers	(000s)	(%)
Vancouver International Airport		
Total traffic	1,287	3.0
US	327	2.0
Other International	293	-1.0
Canada *(YVR)*	667	5.4
Victoria International Airport		
Total traffic *(Victoria Airport Authority)*	108	1.4
Restaurant Receipts	($ millions)	(%)
All establishments	479	0.9
Food service	457	0.9
Drinking places *(Statistics Canada)*	22	0.7
Transportation	(000s)	(%)
Coquihalla Highway		
Passenger Vehicles *(Ministry of Transportation & Highways)*	211	6.2
BC Ferries		
Vehicle Volume	710	4.4
Passenger Volume *(BC Ferries)*	1,813	3.6
Exchange Rates	Cdn $	Change from month ago
US $	0.752	-0.02
UK Pound	0.403	-0.02
Japanese Yen	80.225	-1.80
Australian $ *(Statistics Canada)*	0.968	-0.03

note: pp. percentage points

Note to readers: beginning with this issue, all data are reported on a ***seasonally adjusted*** basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues continued to decline in **March**, falling 1.3% (seasonally adjusted). Mainland/Southwest and Vancouver Island – the two largest regions in the BC tourism economy – both saw revenues fall.

In contrast, visitor entries were up significantly in March (+2.4%, seasonally adjusted) for the first time since last August. There was strong growth in both same-day (+2.1%) and overnight (+4.2%) trips from the US. However, overseas entries fell 3.2%. As well, employment in the key tourism-related industries edged up 1.5%.

Passenger traffic dropped at both the Vancouver and Victoria airports. There was some passenger growth on BC Ferries (+1.6%), but this was modest after two months of strong increases.

For hotels, the occupancy rate increased 3.2%, while prices were unchanged. Indeed, the preliminary room revenues data suggest that hotels saw revenue growth while other accommodation types carried the bulk of the decline.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a two-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a one-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers – reported in the "look ahead" section – were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is -1.3%, the actual number more likely ranges from -1.1% to -1.5%.

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below $20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Visit BC STATS on the World Wide Web at www.bcstats.gov.bc.ca

Special Focus:

BC's Hotel Industry: Towards A New Business Model?

British Columbia's hotel and motel industry has grown considerably in recent years, both in terms of rooms and revenues. However, the industry also faces certain stumbling blocks, such as rising prices for consumers and a growing volume of unused room supply. This report follows economic trends in the hotel and motel industry from 1995 to 2003.

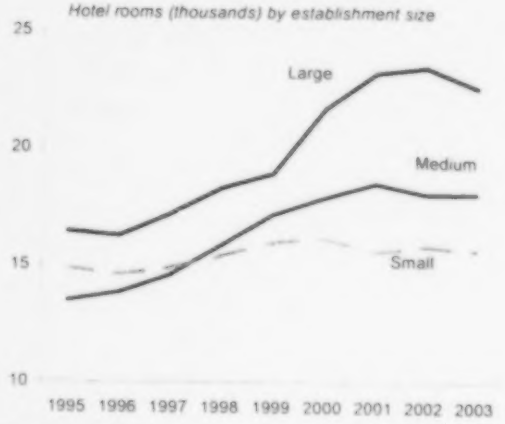
Increasing room supply

The number of hotel and motel rooms in the province has increased 18% over the last eight years. There were roughly 78,400 hotel and motel rooms in BC in 2003, nearly 12,000 more than in 1995.

This has been due, for the most part, to the establishment of more large hotels. For hotels with more than 75 rooms, there was a 36% increase in the room count. The number of rooms at small hotels grew only 5%, and at motels room growth was only 2%. The average number of rooms per property has increased from 49 in 1995 to 56 in 2003 (+15%).

Overall, the industry has expanded, and accommodation providers are running larger operations than in the mid-1990s.

Supply of hotel rooms up from the mid-1990s



Data Source: BC Stats

In spite of increasing room supply, hotel prices have been increasing over the same period. In 1995, average hotel room prices were $92 per night. By 2003, the average hotel price was $115, a 25% increase. This is well above the overall rate of inflation in BC, which has totalled 12% since 1995.

Other things being equal, an increase in room supply should lead to lower prices, as more and more hotels compete for the same number of travellers. Instead, the hotel sector has opted to keep prices high and settle for a lower occupancy rate.

Rising hotel prices, falling occupancy rates

Data Source: Pannell Kerr Forster & BC Stats

Average annual occupancy in the hotel sector has dropped from 68% in 1995 to 58% last year, down roughly 10 percentage points. The highest occupancy rate recorded in the last eight years was 90%, in August 1995. For the last 6 years monthly occupancy has never exceeded 80%. There is significant unused room capacity, even in the peak summer months.

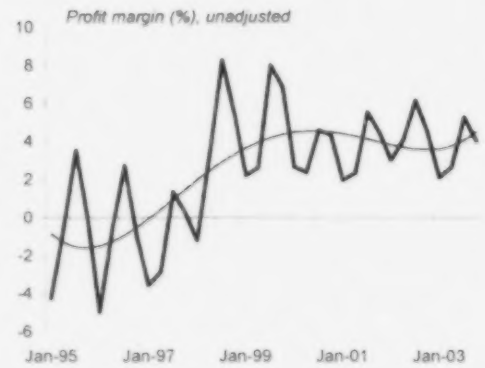
In short, while room supply has increased over the years, the estimated number of *occupied* rooms is practically unchanged (+1%).

An overall measure of financial performance—combining issues of price and occupancy—is revenues per room. It appears that the recent combination of higher prices and lower occupancy is paying off for accommodation providers. Revenues per room among hotels/motels have increased 18% since 1995.

The largest hotels have seen the weakest revenue performance. Hotels with more than 150 rooms have seen revenues per room rise only 7%, compared with 16% at small hotels (1-75 rooms). Large hotels had the greatest increase in room capacity over the last eight years, and are facing tighter competition.

Data on profit margins are not available for the BC hotel industry. However, some rough indication can be gleaned from the national accommodation and food service industry. These data suggest that the industry has seen significant improvements in its operating profit margin. The industry was posting modest operating *losses* from 1995-97, with a three-year average loss of 0.8% of revenues. Since 1998, operating profits have averaged 4.0%.

Nationally, profits in accommodation and food service are up from the mid-1990s



Data Source: SC, Catalogue no. 61-008-XIE

Employment levels flat

In contrast to room supply, revenues and profits, employment in the accommodation industry has been relatively flat in recent years. The accommodation industry had 29,000 employees in 2003. This is up 5%

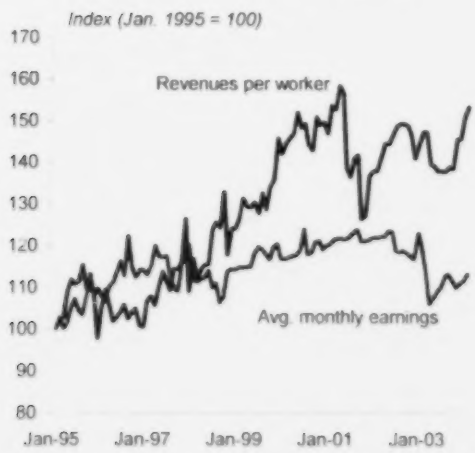
from 1995, but employment peaked in 1996 and has been in slow decline since then.

Minimal employment gains, combined with expanding room supply, suggest that the industry has scaled down its use of labour. Indeed, the number of workers *per 100 rooms* dropped to 37 last year, down from 41 in 1995 (-11%). This is consistent with the decline in occupancy rates—lower occupancy requires fewer cleaning and service staff.

All of this means that the hotel/motel industry has been able to boost its revenues without needing significant increases in employment. Thus, revenues per worker have increased sharply.

Average revenues per worker in 1995 were $2,760 per month. By last year, revenues per worker had risen to $3,660 per month—up 32%.

Monthly earnings lag behind room revenues



Data Source: BC Stats and Statistics Canada

Average monthly earnings have also increased, but not by the same degree. In 1995, average earnings were $1,496 a month. By 2003, earnings had risen 6%, to $1,581 a month.

The net result of these trends is that workers are earning a declining share of room revenues. In 1995, labour earnings represented 54% of room revenues per worker. By 2003, earnings had dropped to 42% of revenues per worker.

Employees earn a declining share of revenues

Data Source: BC Stats and Statistics Canada

Conclusion

There have been considerable changes in the BC hotel industry over the last eight years. Total room supply is up 18%, representing almost 12,000 more rooms. At the same time, occupancy rates have dropped to 58%, down 10 percentage points. This has left a considerable volume of unused capacity in the hotel industry.

A key factor in this unused room capacity is the 25% increase in average hotel prices over the last eight years. Consumers today are paying considerably more for accommodation in BC.

At the same time, revenues per worker have been growing much faster than employee earnings, and workers are receiving a declining share of revenues.

Indeed, there seems to be a new "lean" business model emerging in the hotel industry. Occupancy is low, but prices are rising and labour costs have been held in check. Accommodation providers—even in the peak season—are not operating at full steam, but their financial performance does not seem to have suffered for it.

Table 1: Room Revenue by Development Region ($000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,416	213,447	72,167	43,064	19,364	8,929	46,266	1,486,642
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Feb-03	23,073	73,172	17,794	6,239	3,345	1,560	865	3,519	129,567
Mar-03	22,472	65,150	17,531	6,146	3,608	1,679	743	4,387	121,716
Apr-03	22,785	65,287	17,545	6,012	3,582	1,617	730	3,905	121,463
May-03	22,029	66,720	17,405	5,805	3,555	1,527	739	3,717	121,496
Jun-03	21,896	63,361	17,565	5,823	3,629	1,561	716	3,534	118,085
Jul-03	21,876	64,707	17,157	5,920	3,531	1,582	727	3,883	119,384
Aug-03	22,613	67,570	17,269	5,778	3,544	1,637	728	3,936	123,076
Sep-03	22,421	67,066	16,668	5,697	3,493	1,609	730	3,688	121,372
Oct-03	23,434	67,533	17,839	6,172	3,788	1,608	759	3,790	124,922
Nov-03	23,608	68,464	18,037	5,920	3,681	1,639	716	3,824	125,889
Dec-03	24,089	69,550	19,732	6,489	3,765	1,752	730	4,546	130,653
Jan-04	25,169	68,017	18,716	6,374	3,564	1,690	718	3,894	128,143
Feb-04	24,111	68,212	18,582	6,461	3,651	1,658	725	4,318	127,718
Month-over-month growth rates									
Feb-03	1.7	1.9	-5.9	1.2	-5.6	-2.0	15.7	-0.5	0.4
Mar-03	-2.6	-11.0	-1.5	-1.5	7.9	7.7	-14.1	24.7	-6.1
Apr-03	1.4	0.2	0.1	-2.2	-0.7	-3.7	-1.8	-11.0	-0.2
May-03	-3.3	2.2	-0.8	-3.4	-0.8	-5.6	1.2	-4.8	0.0
Jun-03	-0.6	-5.0	0.9	0.3	2.1	2.2	-3.1	-4.9	-2.8
Jul-03	-0.1	2.1	-2.3	1.7	-2.7	1.3	1.6	9.9	1.1
Aug-03	3.4	4.4	0.7	-2.4	0.4	3.5	0.1	1.4	3.1
Sep-03	-0.8	-0.7	-3.5	-1.4	-1.4	-1.7	0.3	-6.3	-1.4
Oct-03	4.5	0.7	7.0	8.3	8.4	-0.1	4.1	2.7	2.9
Nov-03	0.7	1.4	1.1	-4.1	-2.8	1.9	-5.7	0.9	0.8
Dec-03	2.0	1.6	9.4	9.6	2.3	6.9	2.0	18.9	3.8
Jan-04	4.5	-2.2	-5.1	-1.8	-5.3	-3.5	-1.6	-14.3	-1.9
Feb-04	-4.2	0.3	-0.7	1.4	2.4	-1.9	0.9	10.9	-0.3

February month-over-month percent growth

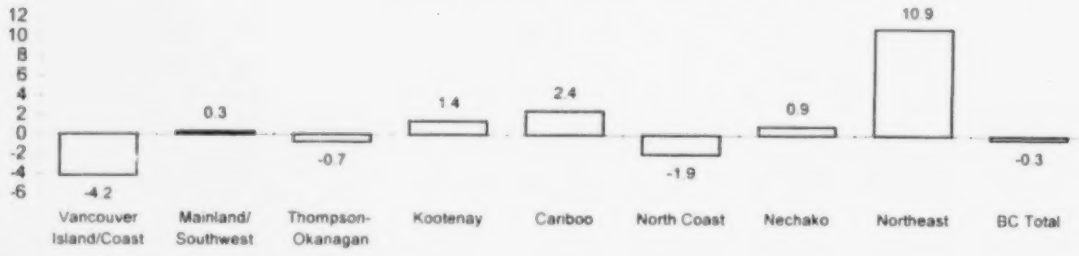


Table 2: Room Revenue by Accommodation Type ($000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			
Annual data							
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,239	181,383	119,472	95,423
Annual growth rates							
1999	5.4	15.3	15.3	12.9	2.2	19.2	12.0
2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.0	-0.2	6.3	9.9
Monthly data							
Feb-03	39,122	15,557	25,021	14,861	15,469	10,182	8,703
Mar-03	34,821	14,805	24,203	14,232	15,126	9,944	8,244
Apr-03	35,294	14,812	24,478	14,372	15,059	9,745	7,443
May-03	35,474	14,528	24,067	14,479	14,664	10,049	7,631
Jun-03	33,491	14,233	24,184	14,264	14,936	9,797	7,641
Jul-03	33,902	14,440	24,180	14,265	14,609	9,838	7,680
Aug-03	36,822	14,921	24,860	14,591	14,689	9,820	7,645
Sep-03	35,657	15,036	24,727	14,240	13,958	9,451	7,870
Oct-03	36,633	15,452	25,506	14,771	15,669	9,790	8,003
Nov-03	36,557	15,736	25,751	14,612	15,358	10,134	7,733
Dec-03	38,652	15,848	25,423	14,817	16,830	10,446	8,840
Jan-04	37,135	15,678	25,643	15,046	15,557	9,796	8,320
Feb-04	36,769	15,383	25,408	14,670	15,655	9,943	8,260
Month-over-month growth rates							
Feb-03	-5.7	0.6	0.1	0.9	3.0	-0.9	8.9
Mar-03	-11.0	-4.8	-3.3	-4.2	-2.2	-2.3	-5.3
Apr-03	1.4	0.0	1.1	1.0	-0.4	-2.0	-9.7
May-03	0.5	-1.9	-1.7	0.7	-2.6	3.1	2.5
Jun-03	-5.6	-2.0	0.5	-1.5	1.9	-2.5	0.1
Jul-03	1.2	1.5	0.0	0.0	-2.2	0.4	0.5
Aug-03	8.6	3.3	2.8	2.3	0.5	-0.2	-0.5
Sep-03	-3.2	0.8	-0.5	-2.4	-5.0	-3.8	2.9
Oct-03	2.7	2.8	3.1	3.7	12.3	3.6	1.7
Nov-03	-0.2	1.8	1.0	-1.1	-2.0	3.5	-3.4
Dec-03	5.7	0.7	-1.3	1.4	9.6	3.1	14.3
Jan-04	-3.9	-1.1	0.9	1.5	-7.6	-6.2	-5.9
Feb-04	-1.0	-1.9	-0.9	-2.5	0.6	1.5	-0.7

February month-over-month percent growth

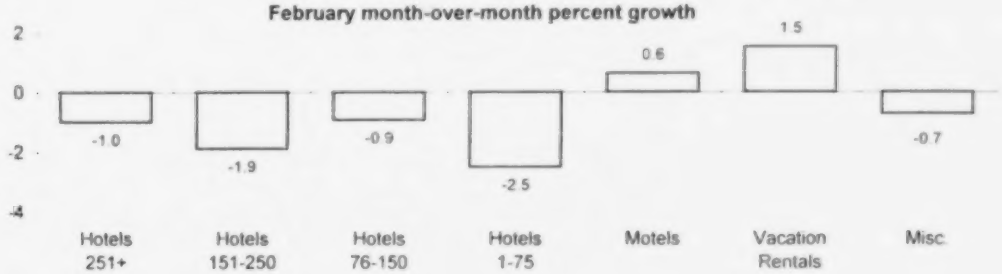


Table 3: Room Revenue by Regional District, Unadjusted

Development Region/ Regional District	Revenue ($000) Feb-04	Revenue ($000) YTD 04	% change from Feb-03	% change from YTD 03	Properties (#) Feb-04	Properties # chg from Feb-03	Rooms (#) Feb-04	Rooms # chg from Feb-03
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	**7,971**	**13,538**	**11.1**	**11.2**	**143**	**1**	**7,839**	**151**
Total - Hotels	6,866	11,548	15.3	15.0	64	0	5,309	67
76+ Rooms	5,340	8,984	19.4	19.1	25	1	3,701	80
1-75 Rooms	1,526	2,564	3.1	2.4	39	-1	1,608	-13
Motels	657	1,195	-2.6	1.2	30	-1	1,117	29
Vacation Rentals	169	322	-29.7	-27.0	20	1	286	30
19 Cowichan Valley								
Total - All accommodation types	**432**	**783**	**7.6**	**11.9**	**33**	**2**	**642**	**16**
Motels	110	211	8.6	29.9	16	1	304	12
21 Nanaimo								
Total - All accommodation types	**2,063**	**3,601**	**8.2**	**6.0**	**63**	**2**	**2,679**	**109**
Total - Hotels	1,180	2,087	10.6	7.0	21	1	1,452	37
Motels	371	652	9.2	4.7	21	1	575	-2
Vacation Rentals	442	744	2.5	3.7	16	1	534	80
23 Alberni-Clayoquot								
Total - All accommodation types	**1,613**	**2,669**	**11.2**	**6.0**	**49**	**1**	**1,315**	**-3**
Motels	128	207	-5.6	-20.8	19	0	400	0
Vacation Rentals	541	861	2.8	-7.7	11	2	276	32
25 Comox-Strathcona								
Total - All accommodation types	**1,649**	**3,057**	**9.0**	**8.3**	**49**	**-5**	**1,487**	**-64**
Motels	458	847	11.3	13.0	23	-1	642	22
27 Powell River								
Total - All accommodation types	**161**	**950**	**4.8**	**195.1**	**17**	**1**	**394**	**27**
43 Mount Waddington								
Total - All accommodation types	**184**	**332**	**-17.1**	**-21.7**	**15**	**0**	**527**	**141**
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	**2,492**	**4,688**	**4.8**	**9.1**	**64**	**0**	**2,522**	**0**
Total - Hotels	1,814	3,342	3.9	8.7	20	-1	1,409	-18
Motels	330	661	3.7	10.9	36	0	923	3
15 Greater Vancouver								
Total - All accommodation types	**34,970**	**64,695**	**7.1**	**4.9**	**230**	**0**	**25,627**	**-82**
Total - Hotels	33,331	61,591	7.9	5.4	159	-2	23,198	-81
251+ Rooms	17,908	32,615	6.3	2.2	25	0	9,956	0
151-250 Rooms	6,635	12,672	9.9	10.1	25	0	4,752	-1
76-150 Rooms	6,628	12,188	8.8	7.0	53	-1	5,749	-98
1-75 Rooms	2,161	4,116	13.4	12.9	56	-1	2,741	18
Motels	852	1,658	-5.0	-4.3	38	0	1,565	-59
Vacation Rentals	484	976	1.9	8.7	15	1	541	51
29 Sunshine Coast								
Total - All accommodation types	**166**	**316**	**11.6**	**3.2**	**20**	**1**	**349**	**-8**
31 Squamish-Lillooet								
Total - All accommodation types	**30,770**	**58,099**	**-17.3**	**-15.1**	**94**	**-1**	**7,093**	**-15**
Total - Hotels	24,331	46,083	-14.0	-13.4	44	-1	5,436	-19
76+ Rooms	22,278	42,195	-14.5	-13.7	25	0	4,676	4
1-75 Rooms	2,052	3,888	-8.2	-10.8	19	-1	760	-23
Vacation Rentals	4,736	8,692	-25.8	-21.0	27	0	1,208	11
Miscellaneous	1,603	3,102	-34.7	-21.9	16	0	280	-7
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	**1,235**	**2,445**	**10.2**	**19.8**	**88**	**-1**	**2,802**	**-130**
Total - Hotels	801	1,554	7.6	11.2	17	-1	1,173	-101
Motels	286	574	23.6	33.1	58	1	1,449	44
33 Thompson-Nicola								
Total - All accommodation types	**4,900**	**8,733**	**17.2**	**11.2**	**138**	**3**	**5,311**	**160**
Total - Hotels	1,813	3,318	21.6	13.4	35	3	2,269	158
76+ Rooms	1,494	2,726	24.8	16.8	12	1	1,389	80
1-75 Rooms	320	592	8.5	-0.1	23	2	880	78
Motels	719	1,410	11.1	11.3	73	-1	2,249	12
Vacation Rentals	2,075	3,448	20.2	12.1	13	1	465	5

Table 3: Room Revenue by Regional District, Unadjusted

Development Region/ Regional District	Revenue ($000) Feb-04	Revenue ($000) YTD 04	Revenue % change from Feb-03	Revenue % change from YTD 03	Properties (#) Feb-04	Properties # chg from Feb-03	Rooms (#) Feb-04	Rooms # chg from Feb-03
35 Central Okanagan								
Total - All accommodation types	**4,378**	**7,950**	**6.8**	**4.1**	**59**	**1**	**3,688**	**39**
Total - Hotels	2,657	4,887	6.0	4.3	21	-1	1,912	-27
Motels	498	880	9.8	5.8	24	0	1,109	29
Vacation Rentals	1,200	2,126	6.2	1.0	12	2	528	42
37 North Okanagan								
Total - All accommodation types	**2,091**	**3,991**	**3.0**	**-2.8**	**40**	**2**	**1,625**	**129**
Total - Hotels	1,369	2,814	-8.7	-10.7	14	0	806	0
Motels	290	513	45.0	38.7	19	3	642	133
39 Columbia-Shuswap								
Total - All accommodation types	**2,445**	**4,438**	**17.1**	**10.8**	**92**	**4**	**2,913**	**-2**
Total - Hotels	899	1,640	6.1	6.9	18	0	1,033	-2
Motels	687	1,188	15.6	7.5	43	0	1,441	-32
Miscellaneous	749	1,428	33.8	19.7	25	4	361	32
Kootenay								
01 East Kootenay								
Total - All accommodation types	**6,051**	**10,463**	**8.7**	**8.3**	**100**	**4**	**4,335**	**44**
Total - Hotels	1,989	3,447	4.7	3.6	26	0	1,531	21
Motels	689	1,226	9.7	5.0	45	2	1,122	18
Vacation Rentals	1,792	2,997	18.5	22.4	12	0	818	-8
03 Central Kootenay								
Total - All accommodation types	**1,136**	**2,054**	**-5.2**	**-2.7**	**68**	**1**	**1,330**	**-104**
Total - Hotels	582	1,082	-0.5	1.5	14	-1	638	-46
Motels	249	396	-26.0	-24.6	26	-4	464	-111
Miscellaneous	261	481	8.2	11.5	17	5	149	46
05 Kootenay Boundary								
Total - All accommodation types	**623**	**1,060**	**16.8**	**9.4**	**35**	**2**	**674**	**24**
Motels	217	366	24.4	14.1	23	1	382	13
Cariboo								
41 Cariboo								
Total - All accommodation types	**758**	**1,513**	**6.8**	**6.7**	**63**	**1**	**1,636**	**-80**
Motels	428	863	1.5	6.3	34	1	1,001	-25
53 Fraser-Fort George								
Total - All accommodation types	**1,692**	**3,196**	**9.2**	**3.3**	**50**	**1**	**2,474**	**31**
Total - Hotels	1,267	2,365	10.0	3.3	19	1	1,407	17
Motels	339	646	3.7	1.0	28	0	969	14
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	**548**	**878**	**11.7**	**12.7**	**27**	**3**	**935**	**53**
Motels	150	229	11.4	15.1	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	**485**	**946**	**2.0**	**2.9**	**24**	**0**	**680**	**-67**
Motels	172	335	-9.1	-3.4	14	-1	331	-74
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	**459**	**875**	**-14.0**	**-10.4**	**38**	**-1**	**1,074**	**-19**
Motels	263	505	-16.0	-11.8	24	-1	639	-17
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	**6,323**	**10,751**	**24.7**	**18.4**	**68**	**5**	**3,618**	**1,070**
Total - Hotels	2,524	4,797	27.6	31.7	21	2	1,527	191
Motels	997	1,910	22.6	17.4	31	0	903	11
Vacation Rentals	2,661	3,800	18.6	1.4	13	3	1,101	868

Table 4: Room Revenue by Urban Centre, Unadjusted

Development Region/ Urban Centre	Revenue ($000)		% change from		Properties (#)	# chg from	Rooms (#)	# chg from
	Feb-04	YTD 04	Feb-03	YTD 03	Feb-04	Feb-03	Feb-04	Feb-03
Vancouver Island/Coast	**14,104**	**24,980**	**9.6**	**11.3**	**374**	**2**	**14,972**	**377**
Victoria (C)	6,638	11,234	15.4	14.9	71	1	5,298	-33
Other CRD	1,333	2,305	-6.3	-4.0	72	0	2,541	184
Nanaimo (C)	1,247	2,234	10.0	5.0	21	1	1,196	9
Port Alberni (C)	200	335	-0.3	-4.1	11	-1	330	-37
Courtenay (C)	597	1,092	11.7	11.2	10	-1	448	-45
Rest of Development Region	4,088	7,781	6.7	14.4	199	1	5,159	299
Mainland/Southwest	**68,399**	**127,798**	**-5.5**	**-5.1**	**408**	**0**	**35,591**	**-105**
Downtown Vancouver (C)	20,898	38,010	7.8	5.6	84	1	12,931	37
Other Vancouver (C)	2,018	3,354	19.7	6.1	33	-3	2,698	-79
Richmond (C)	6,600	12,987	9.9	7.9	23	1	4,321	70
Burnaby (C)	1,475	2,808	-11.3	-7.4	10	-15	1,115	90
Other GVRD	3,980	7,535	1.8	1.5	80	2	4,562	-10
Whistler (DM)	30,245	57,062	-17.4	-15.1	74	0	6,581	8
Rest of Development Region	3,183	6,041	2.0	3.9	104	14	3,383	-221
Thompson/Okanagan	**15,049**	**27,557**	**11.3**	**7.5**	**417**	**9**	**16,339**	**196**
Penticton (C)	872	1,730	8.6	21.7	38	-4	1,673	-119
Kamloops (C)	4,249	7,484	19.1	12.0	65	3	3,649	198
Kelowna (C)	4,221	7,510	8.1	2.9	49	3	3,118	44
Vernon (C)	2,069	3,940	2.6	-3.0	33	2	1,510	122
Revelstoke (C)	1,109	2,128	15.4	7.3	25	0	986	-39
Rest of Development Region	2,530	4,765	11.3	13.4	207	5	5,403	-10
Kootenay	**7,810**	**13,576**	**7.0**	**6.6**	**203**	**7**	**6,339**	**-36**
Cranbrook (C)	432	825	2.0	1.7	17	0	794	0
Rest of Development Region	7,379	12,751	7.3	6.9	186	7	5,545	-36
Cariboo	**2,450**	**4,709**	**8.4**	**4.4**	**113**	**2**	**4,110**	**-49**
Quesnel (C)	196	393	16.8	24.8	12	1	427	7
Williams Lake (C)	218	430	-12.2	-6.5	11	0	534	-34
Prince George (C)	1,297	2,436	9.9	4.2	27	0	1,688	14
Rest of Development Region	739	1,450	11.5	3.8	63	1	1,461	-36
North Coast	**1,033**	**1,824**	**6.9**	**7.4**	**51**	**3**	**1,615**	**-14**
Prince Rupert (C)	486	759	7.3	10.2	15	1	761	40
Rest of Development Region	267	482	9.7	-4.2	27	3	491	-21
Nechako	**459**	**875**	**-14.0**	**-10.4**	**38**	**-1**	**1,074**	**-19**
Smithers (T)	228	405	-7.2	-9.8	11	-1	393	-17
Rest of Development Region	231	469	-19.8	-10.9	27	0	681	271
Northeast	**6,323**	**10,751**	**24.7**	**18.4**	**68**	**5**	**3,618**	**1070**
Dawson Creek (C)	596	1,039	47.2	36.9	14	-1	488	-11
Fort St. John (C)	3,065	4,953	14.2	18.8	21	1	1,732	93
Rest of Development Region	2,662	4,760	34.2	14.6	33	5	1,398	988

Table 5: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**
Annual data								
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,960.1	6,583.2	2,808.1	3,787.8	1,376.9	764.0	411.8	118.0
2003	7,328.1	6,124.0	2,627.8	3,509.7	1,204.0	577.6	410.1	124.8
Annual percent changes								
1999	5.4	4.8	7.9	2.0	8.6	9.7	7.8	6.6
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.2	-4.5	-13.8	4.2	-2.9	4.4	-11.7	-10.5
2003	-7.9	-7.0	-6.4	-7.3	-12.6	-24.4	-0.4	5.8
Monthly data								
Feb-03	630.6	526.2	225.2	309.7	104.4	51.2	35.3	10.1
Mar-03	593.8	495.1	204.7	282.8	98.8	52.9	33.7	9.5
Apr-03	585.0	494.7	208.7	280.9	90.3	36.2	35.2	9.2
May-03	576.9	492.3	210.1	283.1	84.7	28.0	33.6	10.8
Jun-03	596.2	503.6	212.7	290.6	92.6	36.6	33.1	11.0
Jul-03	608.4	512.2	219.4	291.4	96.2	42.0	33.5	10.3
Aug-03	625.5	522.7	224.6	296.2	102.8	49.5	33.8	10.6
Sep-03	619.2	515.7	224.6	291.4	103.4	51.7	33.6	10.8
Oct-03	614.5	509.1	221.7	290.0	105.5	57.8	33.8	9.8
Nov-03	607.0	501.5	214.1	287.4	105.4	57.3	34.3	10.3
Dec-03	609.9	502.6	213.9	288.5	107.3	57.6	34.1	10.7
Jan-04	591.4	484.1	207.4	280.3	107.2	56.6	33.7	11.3
Feb-04	592.0	484.6	208.3	279.8	107.4	55.3	34.2	10.8
Month-over-month growth rates								
Feb-03	-4.6	-4.0	-9.3	-2.5	-7.4	-9.6	-1.9	-14.3
Mar-03	-5.8	-5.9	-9.1	-8.7	-5.4	3.5	-4.4	-5.9
Apr-03	-1.5	-0.1	2.0	-0.7	-8.6	-31.6	4.4	-2.8
May-03	-1.4	-0.5	0.6	0.8	-6.2	-22.7	-4.7	16.5
Jun-03	3.3	2.3	1.2	2.6	9.4	30.9	-1.4	1.8
Jul-03	2.1	1.7	3.2	0.3	3.9	14.6	1.0	-6.1
Aug-03	2.8	2.1	2.4	1.6	6.9	18.0	1.1	2.9
Sep-03	-1.0	-1.3	0.0	-1.6	0.6	4.3	-0.5	1.6
Oct-03	-0.8	-1.3	-1.3	-0.5	1.9	11.9	0.5	-9.2
Nov-03	-1.2	-1.5	-3.4	-0.9	0.0	-1.0	1.4	5.3
Dec-03	0.5	0.2	-0.1	0.4	1.8	0.6	-0.6	4.0
Jan-04	-3.0	-3.7	-3.0	-2.8	-0.1	-1.6	-1.1	5.5
Feb-04	0.1	0.1	0.4	-0.2	0.2	-2.3	1.4	-4.0

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 6: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquihalla Hwy
	Total	Domestic	Trans-border	Other Int'l.	Total	Vehicles	Passengers	Passenger Vehicles
Annual data								
1999	15,806	8,314	4,120	3,372	1,191.5	7,852	21,369	2,378
2000	16,033	8,306	4,074	3,652	1,139.3	7,887	21,280	2,389
2001	15,477	7,869	4,001	3,608	1,158.1	8,104	21,309	2,449
2002	14,877	7,422	3,855	3,600	1,102.2	8,272	21,540	2,518
2003	14,322	7,267	3,815	3,241	1,182.9	8,263	21,339	2,466
Annual growth rates								
1999	1.9	1.2	-0.1	6.4	-1.9	0.4	-0.2	0.6
2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.1
Monthly data								
Feb-03	1,200	601	316	283	95.6	704	1,823	214
Mar-03	1,204	599	321	284	94.2	680	1,777	182
Apr-03	1,080	560	291	230	93.0	681	1,764	210
May-03	1,087	571	308	209	94.4	684	1,754	207
Jun-03	1,135	583	315	238	94.4	694	1,785	218
Jul-03	1,185	605	321	259	99.5	696	1,787	210
Aug-03	1,223	614	334	275	101.3	699	1,808	199
Sep-03	1,220	618	320	283	102.2	697	1,791	195
Oct-03	1,229	624	317	288	105.0	693	1,784	216
Nov-03	1,257	631	326	301	104.1	688	1,762	195
Dec-03	1,268	645	324	299	106.3	643	1,674	207
Jan-04	1,249	633	321	295	104.5	680	1,750	198
Feb-04	1,287	667	327	293	106.0	710	1,813	211
Month-over-month growth rates								
Feb-03	-2.8	-2.8	-2.4	-3.2	2.9	-0.1	-0.4	0.7
Mar-03	0.3	-0.3	1.6	0.3	-1.5	-3.4	-2.5	-15.2
Apr-03	-10.3	-6.4	-9.5	-19.2	-1.3	0.2	-0.8	15.5
May-03	0.6	1.9	5.9	-9.1	1.5	0.4	-0.6	-1.4
Jun-03	4.4	2.1	2.3	13.9	0.0	1.4	1.8	5.1
Jul-03	4.4	3.8	1.9	9.0	5.4	0.3	0.1	-3.7
Aug-03	3.2	1.5	4.1	6.2	1.8	0.4	1.2	-5.3
Sep-03	-0.2	0.7	-4.2	2.7	0.9	-0.3	-1.0	-1.7
Oct-03	0.7	0.9	-0.9	1.9	2.7	-0.5	-0.4	10.9
Nov-03	2.4	1.1	2.8	4.5	-0.9	-0.8	-1.3	-9.9
Dec-03	0.8	2.3	-0.6	-0.8	2.1	-6.5	-5.0	6.4
Jan-04	-1.5	-1.9	-1.0	-1.1	-1.7	5.7	4.6	-4.4
Feb-04	3.0	5.4	2.0	-1.0	1.4	4.4	3.6	6.2

Table 7: Tourism Sector Indicators, Seasonally adjusted

Period	Key industries in tourism sector					Hotel Industry[2]		Consumer Price Index[1]	
	Total tourism related	Air transport[4]	Accom-modation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%)[3]	Room Rate ($)	Traveller accom-modation	Restaurant food[4]
Annual data									
1999	181.7	15.3	29.2	110.1	27.1	61.7	112.03	133.1	115.6
2000	188.4	14.8	28.2	116.7	28.8	60.0	114.05	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	116.99	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	115.03	111.8	127.6
Annual Growth Rates									
1999	-1.5	-3.6	-0.5	0.4	-8.5	-0.2	3.1	2.4	1.5
2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.6	0.7	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-1.7	-9.9	1.8
Monthly data									
Feb-03	194.7	12.8	29.3	119.7	33.0	59.5	118.40	118.9	126.8
Mar-03	192.9	13.1	28.6	117.9	33.3	55.8	115.00	116.0	126.9
Apr-03	193.8	12.6	29.1	117.9	34.2	56.8	115.00	115.2	127.0
May-03	192.9	12.8	29.2	117.0	33.9	57.2	114.90	112.2	127.1
Jun-03	193.5	13.2	28.7	116.6	34.9	56.7	112.50	110.5	127.3
Jul-03	193.2	12.7	28.8	117.9	33.7	57.0	113.20	109.2	127.7
Aug-03	193.3	12.5	29.5	117.6	33.6	59.1	113.40	109.0	128.1
Sep-03	190.0	12.7	29.2	115.1	33.0	57.8	114.30	106.9	128.1
Oct-03	189.6	12.7	28.6	116.5	31.8	59.8	114.90	109.0	128.2
Nov-03	192.3	12.6	28.5	118.1	33.2	60.5	114.20	108.2	128.7
Dec-03	194.0	12.2	28.1	120.4	33.3	60.5	114.90	106.7	128.6
Jan-04	194.4	12.7	27.3	120.5	33.8	60.0	113.60	103.9	128.9
Feb-04	189.7	12.9	27.0	116.2	33.6	58.7	112.40	102.4	128.9
Month-over-month growth rates									
Feb-03	0.5	-0.5	-1.8	1.3	0.0	0.8	-1.1	-1.2	0.1
Mar-03	-0.9	2.3	-2.4	-1.5	1.0	-6.2	-2.9	-2.4	0.1
Apr-03	0.5	-3.3	1.6	0.0	2.7	1.8	0.0	-0.7	0.1
May-03	-0.5	1.4	0.2	-0.8	-0.8	0.7	-0.1	-2.6	0.1
Jun-03	0.3	3.1	-1.5	-0.3	2.9	-0.9	-2.1	-1.5	0.2
Jul-03	-0.2	-3.8	0.3	1.1	-3.5	0.5	0.6	-1.2	0.3
Aug-03	0.1	-1.4	2.3	-0.3	-0.1	3.7	0.2	-0.2	0.3
Sep-03	-1.7	1.2	-1.1	-2.1	-2.0	-2.2	0.8	-1.9	0.0
Oct-03	-0.2	0.2	-2.1	1.2	-3.5	3.5	0.5	2.0	0.1
Nov-03	1.4	-1.1	-0.3	1.4	4.2	1.2	-0.6	-0.7	0.4
Dec-03	0.9	-2.7	-1.4	1.9	0.3	0.0	0.6	-1.4	-0.1
Jan-04	0.2	4.2	-2.7	0.1	1.7	-0.8	-1.1	-2.6	0.2
Feb-04	-2.4	1.5	-1.0	-3.6	-0.8	-2.2	-1.1	-1.4	0.0

[1]Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

[2]Source: Pannell Kerr Forster and BC Stats

[3]Occupancy Rate change expressed as percentage point change

[4] No identifiable seasonality.

Table 8: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns [1]					
	Receipts ($ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
Annual data						
1999	4,467.5	369.8	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
2003	5,388.8	284.4	5,104.3	33,648.9	2,089.1	31,559.8
Annual growth rates						
1999	-3.7	-7.3	-3.4	4.3	12.9	3.6
2000	8.1	-2.9	9.1	7.5	8.4	7.4
2001	7.1	-0.3	7.7	6.6	3.2	6.8
2002	-1.5	-14.6	-0.5	2.8	-1.7	3.1
2003	5.6	-7.0	6.4	1.6	-6.8	2.2
Monthly data						
Feb-03	428	24	404	2,761	179	2,582
Mar-03	427	23	404	2,770	179	2,591
Apr-03	431	25	407	2,723	179	2,544
May-03	431	24	408	2,776	173	2,602
Jun-03	431	24	407	2,778	175	2,603
Jul-03	453	24	428	2,793	181	2,612
Aug-03	462	24	438	2,820	174	2,646
Sep-03	465	23	442	2,827	167	2,660
Oct-03	471	22	449	2,865	168	2,697
Nov-03	477	23	454	2,888	169	2,719
Dec-03	475	24	452	2,879	167	2,713
Jan-04	475	22	453	2,868	157	2,711
Feb-04	479	22	457	2,917	165	2,751
Month-over-month growth rates						
Feb-03	-1.9	-0.7	-2.0	-0.3	0.0	-0.3
Mar-03	-0.2	-4.2	0.0	0.3	0.0	0.4
Apr-03	1.0	5.9	0.7	-1.7	0.1	-1.8
May-03	0.0	-3.7	0.2	2.0	-3.1	2.3
Jun-03	0.0	1.3	-0.1	0.1	1.1	0.0
Jul-03	4.9	1.2	5.1	0.5	3.4	0.4
Aug-03	2.2	-1.5	2.4	1.0	-3.9	1.3
Sep-03	0.5	-5.9	0.8	0.3	-3.8	0.5
Oct-03	1.4	-2.0	1.6	1.3	0.3	1.4
Nov-03	1.3	1.8	1.2	0.8	0.4	0.8
Dec-03	-0.3	4.7	-0.6	-0.3	-1.2	-0.2
Jan-04	-0.1	-5.6	0.2	-0.4	-5.4	-0.1
Feb-04	0.9	0.7	0.9	1.7	5.1	1.5

[1]Source: Statistics Canada & BC Stats

BRITISH COLUMBIA

BC STATS

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Tourism Sector Monitor ◆ June 2004

Room Revenue

Room revenues in BC edged downwards (-1.2% seasonally adjusted) in March, the third consecutive month of decline.

Revenues were down in almost all regions, most sharply in Kootenay (-7.6%) and northern BC (-4.4%). The largest regions, Vancouver Island/Coast (-1.2%) and Mainland Southwest (-1.3%), posted more moderate declines in room revenue.

Room revenues on a three-month downturn

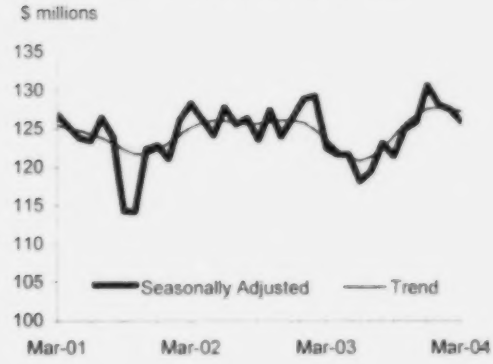


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type	Mar.04 ($000)	Feb.04 ($000)	% change
Total	125,860	127,435	-1.2
Hotels	93,778	92,386	+1.5
Motels	15,747	15,677	+0.4
Other Acc.	16,517	17,635	-6.3
Regions (Top 3 performers)			
Cariboo	3,813	3,641	+4.7
Thompson-Okanagan	18,892	18,650	+1.3
Vancouver Island	23,698	23,995	-1.2

Thompson-Okanagan (+1.3%) and Cariboo (+4.7%) were the only areas posting revenue gains in March.

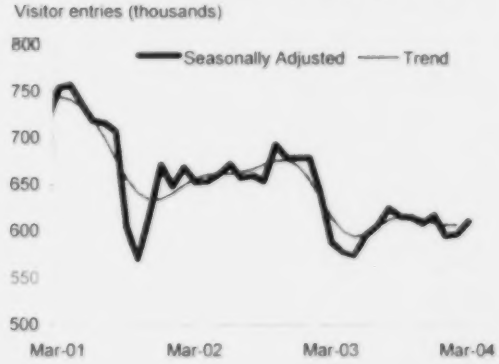
Non-standard accommodation types—beach houses, ski resorts, and the like—bore the brunt of the decline in March. While hotels (+1.5%) and motels (0.4%) saw slight gains, revenues at "other" accommodation types were down 6.3%.

Visitor Entries

In contrast to room revenues, the volume of travellers entering Canada via BC rose 1.9%(seasonally adjusted) in March. Entries from the US were up 3.0%, with stronger growth among overnight visitors (+4.9%) than for those making same-day cross-border excursions (+2.1%).

Partly offsetting the rise of US visitors was a drop in the number overseas travellers entering BC (-2.8%).

Visitor entries edge upward



Special Focus Article: *Non-Standard Accommodation on the Rise.*

Table 2. Traveller Entries
(seasonally adjusted)

	Mar-04 ('000)	Feb-04 ('000)	% chg from Feb-04
American visitors			
Total	502	488	3.0
Same-day	210	206	2.1
Overnight	298	284	4.9
Overseas visitors			
Total	104	107	-2.8
Europe	34	34	-1.2
UK	16	16	0.7
Asia	57	54	4.3
Japan	19	21	-13.0
Taiwan	8	7	5.0
Oceania	9	11	-14.0

(BC STATS & Statistics Canada)

note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

There are mixed signals in the other tourism indicators.

Downward pressure on prices eased off a bit in March. The consumer price index for traveller accommodation overall fell 0.2%, the smallest decline seen in four months.

In the hotel industry specifically, room prices were unchanged and occupancy rose 1.9 percentage points. Employment in the accommodation sector was up 1.1%, after six consecutive months of job loss.

Restaurant and tavern receipts rose 2.0% in March, the strongest showing in six months. Revenues were up at both restaurants (+2.1%) and drinking places (+0.7%).

Overall, these data suggest that the hotel and food service industries fared well in March. Indeed, while total room revenues were down this month, non-standard accommodation types carried the bulk of the decline.

In contrast to the indicators for accommodation and food service, transportation indicators were relatively weak in March. Passenger traffic inched down 1.4% at the Vancouver Airport. Passenger vehicle traffic over the Coquihalla highway was down 2.1%.

In the Vancouver Island region, traffic at the Victoria airport was down 3.5%. However, passenger volumes aboard BC Ferries were up 1.8%.

The Canadian dollar held at US$ 0.75 in March, unchanged from the month before. Against several other major currencies, the Canadian dollar appreciated slightly. While a stronger Canadian dollar might be expected to deter international visitors, the exchange rate fluctuations in March were too small to have any meaningful effect on tourism.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Total	Change from month ago
Hotel Industry		
Occupancy rate	60.6	1.9 pp
Average room charge *(Pannell Kerr Forster)*	112.30	-0.1%
Airport Passengers	(000s)	(%)
Vancouver International Airport		
Total traffic	1,269	-1.4
US	328	0.2
Other International	292	-0.2
Canada *(YVR)*	649	-2.7
Victoria International Airport		
Total traffic *(Victoria Airport Authority)*	102	-3.5
Restaurant Receipts	($ millions)	(%)
All establishments	491	2.0
Food service	469	2.1
Drinking places *(Statistics Canada)*	23	0.7
Transportation	(000s)	(%)
Coquihalla Highway		
Passenger Vehicles *(Ministry of Transportation & Highways)*	205	-2.1
BC Ferries		
Vehicle Volume	715	0.8
Passenger Volume *(BC Ferries)*	1,842	1.6
Exchange Rates	Cdn $	Change from month ago
US $	0.753	0.00
UK Pound	0.412	0.01
Japanese Yen	81.653	1.43
Australian $ *(Statistics Canada)*	1.004	0.04

note: pp: percentage points

Note to readers: all data in the *Tourism Sector Monitor* are now reported on a **seasonally adjusted** basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues climbed 3.5% in April (seasonally adjusted), bouncing back after three months of decline. The Mainland /Southwest region was the main engine for revenue growth.

In the hotel industry, the monthly survey by Pannell Kerr Forester showed that the occupancy rate climbed 0.9 percentage points, while prices rose 1.4%.

Visitor entries posted a second monthly increase in April (+2.1%). The number of overseas visitors jumped 7.2%, and overnight visitors from the US increased as well (+0.5%).

Overall, the preliminary indications are that April was a relatively strong month for tourism in BC.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a two-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a one-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

Special Focus:
Non-Standard Accommodation on the Rise

Hotels and motels occupy a vast portion of the accommodation market in BC. However, in recent years there has been strong growth in non-standard accommodations—bed & breakfasts, beach houses, golf resorts, and so on. This points to an accommodation market that offers a greater variety of products and increasing competitive pressure on the more traditional hotels and motels.

What is non-standard accommodation?

For the purposes of this article, "non-standard" accommodation combines vacation rentals and miscellaneous establishments, as reported in table 2 of the appendix. It covers all accommodations excluding hotels and motels.

Vacation rentals include beach houses, cabins, condos, and the like. In the miscellaneous category are a broad assortment of establishments such as specialty resorts, bed & breakfasts, hostels, work camps, and even university residences (the latter are often rented on a short-term basis in the summer). Vacation rentals and specialty resorts make up the bulk of non-standard accommodations.

A Growing Market Segment

Non-standard establishments combined have more than 18,000 rooms, making up 19% of total room supply. Since 1995, the room supply of non-standard establishments has increased 46%—more than twice the rate for hotels and motels (+18%).

Non-standard establishments tend to be much smaller, with an average of 19 rooms compared to more than 50 rooms in the average hotel/motel.

Room revenues in the non-standard segment of the market have risen 148% since 1995 (compared to 39% for hotels and motels). Its market share has increased from 9% of total revenues in 1995 to 14% in 2003.

Non-standard accommodation takes a growing share of the market

While the non-standard segment is still relatively small, it is becoming an increasingly important competitor for hotels and motels.

Regional Differences

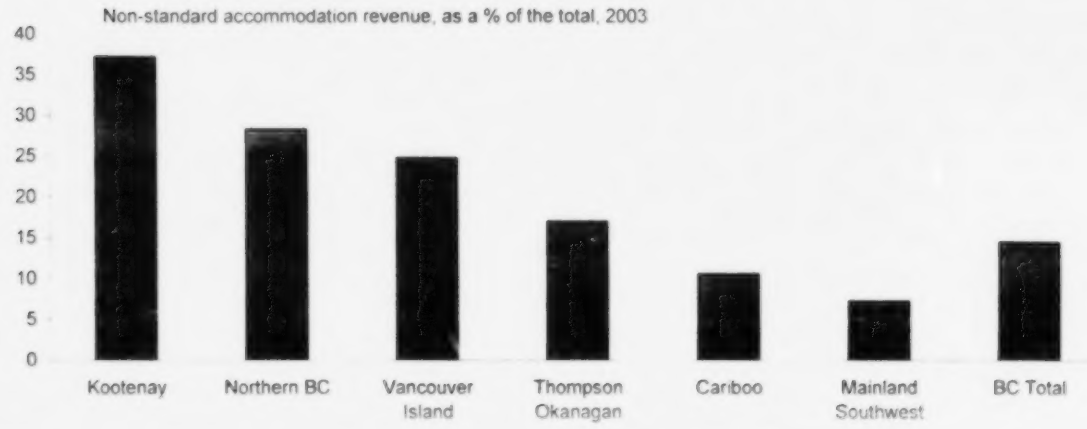
There are large differences in the market share of non-standard accommodation across BC.

In Mainland Southwest—Vancouver and its surrounding areas—non-standard accommodation only holds 7% of the market. This is a heavily urban market dominated by high-rise hotels.

In the Kootenays, non-standard lodging has a 37% market share. These establishments also have a strong presence in Northern BC (28%) and Vancouver Island (25%).

Non-standard accommodation providers have been increasing their market share in every region of the province since 1995.

The market share of non-standard accommodation varies widely in BC



The largest absolute gain has been in Northern BC, where market share increased by 20 percentage points. However, this is largely due to the growth of work camps—outfits linked to the oil and gas industry in the Northeast that provide temporary accommodation for workers.

The Thompson-Okanagan region is a very popular destination for summer tourism, but non-standard accommodation providers have made few inroads in the region. Their market share is 17%—modest compared to Vancouver Island or the Kootenays—and over the last nine years this share has increased only 3 percentage points.

In Cariboo—the region encompassing Prince George and Williams Lake—there has been no net growth in total room revenues over the past nine years. Indeed, factoring in inflation, the tourism sector has been fading. It is here where non-standard accommodation providers have made the least progress, expanding their market share by only one percentage point since 1995.

Market Share of Non-Standard Accommodations	2003	1995	Percentage point difference
Kootenay	37%	22%	15
Northern BC	28%	9%	20
Vancouver Island	25%	16%	9
Thompson-Okanagan	17%	14%	3
Cariboo	11%	9%	1
Mainland Southwest	7%	4%	4
BC Total	14%	9%	6

Source: BC Stats

In the Kootenays, non-standard accommodations have the strongest presence and have continued to claim a larger market share over the last nine years. Their market share has increased by 15 percentage points, with the growth of lakeside cabins, ski resorts, and the like. If current trends continue, non-standard accommodation will have more than half of the market within the next decade.

The modern trend for tourism in BC—in every region—is away from hotels and motels and towards smaller and more specialized accommodations. This offers travellers in BC a wider range of experiences, and will likely present increasing competition against hotels and motels in the years ahead.

Table 1: Room Revenue by Development Region ($000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Mar-03	22,687	65,676	17,327	6,228	3,571	1,724	756	4,449	122,419
Apr-03	22,778	65,329	17,548	6,026	3,579	1,634	733	3,977	121,601
May-03	22,100	66,747	17,406	5,786	3,555	1,523	749	3,713	121,579
Jun-03	21,873	63,361	17,610	5,807	3,629	1,557	716	3,526	118,078
Jul-03	21,887	64,719	17,166	5,909	3,534	1,577	727	3,889	119,407
Aug-03	22,572	67,569	17,280	5,747	3,549	1,632	728	3,924	122,999
Sep-03	22,450	67,036	16,655	5,709	3,497	1,603	730	3,691	121,370
Oct-03	23,409	67,508	17,865	6,150	3,791	1,600	759	3,781	124,863
Nov-03	23,543	68,426	18,068	5,939	3,683	1,629	713	3,790	125,791
Dec-03	24,018	69,481	19,778	6,496	3,768	1,754	726	4,551	130,572
Jan-04	25,277	67,841	18,738	6,304	3,597	1,679	711	3,850	127,998
Feb-04	23,995	67,954	18,650	6,575	3,641	1,646	710	4,265	127,435
Mar-04	23,698	67,054	18,892	6,076	3,813	1,581	617	4,128	125,860
Month-over-month growth rates									
Mar-03	-1.4	-9.9	-2.8	-0.2	7.1	11.2	-11.2	28.0	-5.3
Apr-03	0.4	-0.5	1.3	-3.3	0.2	-5.3	-3.1	-10.6	-0.7
May-03	-3.0	2.2	-0.8	-4.0	-0.7	-6.8	2.3	-6.6	0.0
Jun-03	-1.0	-5.1	1.2	0.4	2.1	2.2	-4.4	-5.0	-2.9
Jul-03	0.1	2.1	-2.5	1.8	-2.6	1.3	1.5	10.3	1.1
Aug-03	3.1	4.4	0.7	-2.7	0.4	3.4	0.1	0.9	3.0
Sep-03	-0.5	-0.8	-3.6	-0.7	-1.4	-1.8	0.3	-5.9	-1.3
Oct-03	4.3	0.7	7.3	7.7	8.4	-0.2	4.0	2.4	2.9
Nov-03	0.6	1.4	1.1	-3.4	-2.8	1.8	-6.0	0.2	0.7
Dec-03	2.0	1.5	9.5	9.4	2.3	7.7	1.9	20.1	3.8
Jan-04	5.2	-2.4	-5.3	-3.0	-4.5	-4.3	-2.1	-15.4	-2.0
Feb-04	-5.1	0.2	-0.5	4.3	1.2	-2.0	-0.1	10.8	-0.4
Mar-04	-1.2	-1.3	1.3	-7.6	4.7	-3.9	-13.1	-3.2	-1.2

March month-over-month percent growth

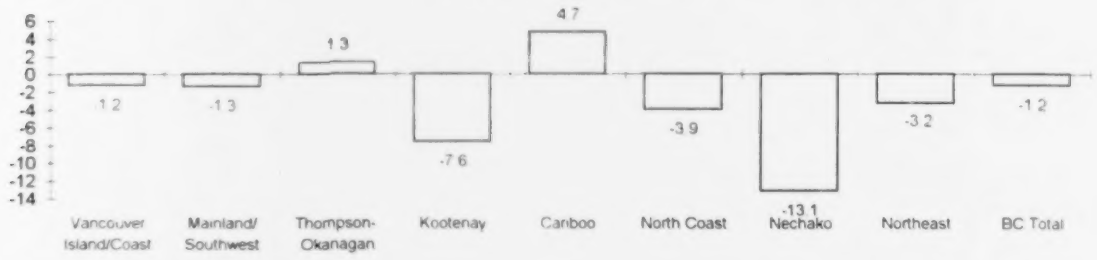


Table 2: Room Revenue by Accommodation Type ($000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			
Annual data							
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,262	181,383	119,487	95,423
Annual growth rates							
1999	5.4	15.3	15.3	12.9	2.2	19.2	12.0
2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
Monthly data							
Mar-03	34,966	14,659	24,098	14,280	15,054	10,382	9,110
Apr-03	35,227	14,817	24,207	14,351	15,069	9,660	7,449
May-03	35,420	14,496	24,024	14,446	14,660	10,033	7,623
Jun-03	33,465	14,102	24,161	14,316	14,936	9,795	7,652
Jul-03	33,930	14,333	24,155	14,256	14,614	9,851	7,665
Aug-03	36,882	14,955	24,847	14,561	14,692	9,846	7,637
Sep-03	35,721	14,979	24,727	14,206	13,959	9,462	7,828
Oct-03	36,694	15,420	25,536	14,783	15,677	9,775	7,931
Nov-03	36,564	15,736	25,768	14,635	15,367	10,073	7,619
Dec-03	38,618	16,028	25,467	14,832	16,846	10,447	8,741
Jan-04	37,061	15,831	25,692	15,000	15,551	9,621	8,155
Feb-04	36,634	15,523	25,554	14,676	15,677	9,753	7,882
Mar-04	37,343	16,075	25,663	14,696	15,747	9,209	7,308
Month-over-month growth rates							
Mar-03	-10.3	-6.9	-4.2	-3.8	-2.8	3.9	9.1
Apr-03	0.7	1.1	1.4	0.5	0.1	-7.0	-18.2
May-03	0.5	-2.2	-1.7	0.7	-2.7	3.9	2.3
Jun-03	-5.5	-2.7	0.6	-0.9	1.9	-2.4	0.4
Jul-03	1.4	1.6	0.0	-0.4	-2.2	0.6	0.2
Aug-03	8.7	4.3	2.9	2.1	0.5	0.0	-0.4
Sep-03	-3.1	0.2	-0.5	-2.4	-5.0	-3.9	2.5
Oct-03	2.7	2.9	3.3	4.1	12.3	3.3	1.3
Nov-03	-0.4	2.0	0.9	-1.0	-2.0	3.0	-3.9
Dec-03	5.6	1.9	-1.2	1.3	9.6	3.7	14.7
Jan-04	-4.0	-1.2	0.9	1.1	-7.7	-7.9	-6.7
Feb-04	-1.2	-1.9	-0.5	-2.2	0.8	1.4	-3.4
Mar-04	1.9	3.6	0.4	0.1	0.4	-5.6	-7.3

March month-over-month percent growth

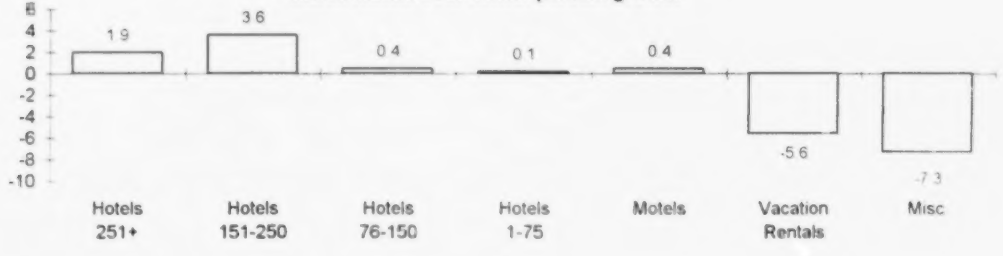


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Mar-04	Revenue ($000) YTD 04	Revenue % change from Mar-03	Revenue % change from YTD 03	Properties (#) Mar-04	Properties # chg from Mar-03	Rooms (#) Mar-04	Rooms # chg from Mar-03
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	**9,874**	**23,412**	**5.4**	**8.6**	**151**	**-5**	**7,850**	**76**
Total - Hotels	8,474	20,022	9.0	12.3	64	-1	5,310	63
76+ Rooms	6,626	15,610	13.8	16.8	25	1	3,701	80
1-75 Rooms	1,848	4,412	-5.6	-1.1	39	-2	1,609	-17
Motels	806	2,001	-3.2	-0.6	27	-2	1,028	-26
Vacation Rentals	212	535	-42.2	-33.9	20	-2	290	-3
19 Cowichan Valley								
Total - All accommodation types	**514**	**1,296**	**-2.8**	**5.6**	**33**	**1**	**543**	**12**
Motels	164	375	24.7	27.5	16	1	305	12
21 Nanaimo								
Total - All accommodation types	**2,550**	**6,150**	**8.1**	**6.9**	**64**	**-3**	**2,561**	**-170**
Total - Hotels	1,443	3,530	16.5	10.7	19	-1	1,340	-75
Motels	509	1,161	5.6	5.1	23	-2	563	-95
Vacation Rentals	548	1,292	-1.3	1.5	16	1	534	5
23 Alberni-Clayoquot								
Total - All accommodation types	1,908	4,577	0.9	3.8	56	-2	1,316	-75
Motels	184	391	10.5	-8.6	20	-1	405	-12
Vacation Rentals	731	1,592	0.1	-4.3	16	4	323	52
25 Comox-Strathcona								
Total - All accommodation types	**1,972**	**5,062**	**0.1**	**5.6**	**63**	**2**	**1,723**	**-20**
Motels	557	1,404	6.0	10.1	27	2	702	33
Vacation Rentals	263	719	-1.6	3.0	15	0	193	4
27 Powell River								
Total - All accommodation types	**199**	**1,149**	**-15.1**	**106.6**	**16**	**0**	**340**	**-23**
43 Mount Waddington								
Total - All accommodation types	**214**	**545**	**-12.2**	**-18.2**	**15**	**1**	**493**	**135**
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	3,002	7,690	4.0	7.1	68	1	2,589	20
Total - Hotels	2,220	5,562	5.2	7.3	21	0	1,430	3
Motels	483	1,145	8.6	9.9	36	1	952	15
15 Greater Vancouver								
Total - All accommodation types	**44,474**	**109,169**	**16.9**	**9.5**	**227**	**-5**	**25,577**	**-65**
Total - Hotels	42,585	104,176	18.0	10.2	159	-1	23,166	-12
251+ Rooms	24,446	57,061	23.6	10.4	25	0	9,956	0
151-250 Rooms	7,733	20,405	12.1	10.9	25	0	4,752	-1
76-150 Rooms	7,856	20,044	0.2	7.9	53	0	5,749	21
1-75 Rooms	2,549	6,665	15.1	13.7	56	-1	2,709	-32
Motels	1,083	2,741	-5.4	-4.7	36	-2	1,536	-95
Vacation Rentals	590	1,566	-1.9	4.4	17	2	573	76
29 Sunshine Coast								
Total - All accommodation types	**224**	**539**	**3.3**	**3.2**	**19**	**0**	**334**	**-28**
31 Squamish-Lillooet								
Total - All accommodation types	**26,623**	**84,747**	**-17.3**	**-15.8**	**98**	**1**	**7,177**	**5**
Total - Hotels	21,049	67,132	-16.1	-14.3	44	0	5,436	4
76+ Rooms	19,160	61,354	-16.8	-14.7	25	0	4,676	4
1-75 Rooms	1,889	5,777	-8.9	-10.2	19	0	760	0
Vacation Rentals	4,075	12,791	-19.1	-20.2	29	2	1,210	13
Miscellaneous	1,404	4,506	-27.9	-23.9	18	-1	362	-12
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	**1,684**	**4,129**	**22.8**	**21.0**	**100**	**5**	**2,926**	**-51**
Total - Hotels	1,068	2,622	23.1	15.8	18	-1	1,179	-101
Motels	526	1,100	40.6	36.6	65	6	1,562	119
33 Thompson-Nicola								
Total - All accommodation types	**5,143**	**13,876**	**16.4**	**13.1**	**139**	**1**	**5,280**	**58**
Total - Hotels	2,321	5,639	35.0	21.4	34	1	2,197	9
76+ Rooms	1,949	4,674	45.9	27.4	12	0	1,389	0
1-75 Rooms	372	964	-3.0	-1.2	22	1	808	9
Motels	1,009	2,418	11.8	11.5	77	-1	2,304	22
Miscellaneous	302	848	-2.9	-3.9	14	1	289	13

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Mar-04	Revenue ($000) YTD 04	% change from Mar-03	% change from YTD 03	Properties (#) Mar-04	Properties # chg from Mar-03	Rooms (#) Mar-04	Rooms # chg from Mar-03
35 Central Okanagan								
Total - All accommodation types	**4,734**	**12,684**	**2.4**	**3.4**	**61**	**2**	**3,841**	**64**
Total - Hotels	3,073	7,960	3.8	4.1	21	0	1,912	-2
Motels	652	1,532	11.8	8.2	26	1	1,151	37
37 North Okanagan								
Total - All accommodation types	**1,753**	**5,743**	**8.0**	**0.3**	**40**	**1**	**1,621**	**114**
Total - Hotels	1,137	3,952	-3.9	-8.8	14	0	806	0
Motels	411	924	48.6	42.9	19	2	642	122
39 Columbia-Shuswap								
Total - All accommodation types	**2,464**	**6,902**	**-9.5**	**2.6**	**93**	**3**	**2,900**	**-12**
Total - Hotels	955	2,595	4.7	6.1	18	0	1,033	-2
Motels	732	1,920	8.1	7.7	44	-1	1,448	-42
Miscellaneous	677	2,105	-34.8	-5.6	22	4	320	32
Kootenay								
01 East Kootenay								
Total - All accommodation types	**5,878**	**16,495**	**-3.3**	**4.8**	**110**	**1**	**4,517**	**43**
Total - Hotels	1,806	5,253	-5.5	0.3	26	-2	1,531	-29
Motels	686	1,913	2.4	4.1	45	-1	1,129	12
Vacation Rentals	1,858	5,010	6.7	19.5	19	1	864	26
03 Central Kootenay								
Total - All accommodation types	**1,210**	**3,265**	**13.2**	**2.7**	**65**	**1**	**1,366**	**-51**
Total - Hotels	698	1,781	15.9	6.7	15	-1	660	-44
Motels	241	638	-0.8	-16.9	28	0	518	-37
Miscellaneous	218	700	19.1	13.8	11	2	110	29
05 Kootenay Boundary								
Total - All accommodation types	**529**	**1,589**	**-11.4**	**1.5**	**36**	**0**	**694**	**-1**
Motels	209	575	-18.3	-0.3	23	-1	398	-8
Cariboo								
41 Cariboo								
Total - All accommodation types	**959**	**2,472**	**6.4**	**6.6**	**66**	**-2**	**1,680**	**-96**
Motels	558	1,421	3.6	5.2	35	-1	1,026	-44
Vacation Rentals	7	42	-42.4	-5.2	11	-1	81	-16
53 Fraser-Fort George								
Total - All accommodation types	**2,236**	**5,432**	**7.0**	**4.8**	**50**	**-1**	**2,457**	**-12**
Total - Hotels	1,640	4,005	15.1	7.8	18	0	1,387	-10
Motels	483	1,130	1.7	1.3	28	-1	962	-2
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	**446**	**1,325**	**2.4**	**9.0**	**29**	**1**	**959**	**41**
Motels	131	361	21.5	17.3	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	**594**	**1,539**	**-13.3**	**-4.0**	**31**	**1**	**793**	**-7**
Motels	189	524	-36.3	-18.6	17	1	404	9
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	**507**	**1,382**	**-15.9**	**-12.5**	**40**	**-1**	**1,088**	**-44**
Motels	295	799	-20.2	-15.1	25	-2	646	-46
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	**6,459**	**17,210**	**-5.8**	**8.0**	**68**	**5**	**3,537**	**1,029**
Total - Hotels	3,021	7,819	30.9	31.4	22	3	1,514	178
Motels	1,249	3,159	11.6	15.0	31	-1	895	-17
Vacation Rentals	2,094	5,894	-38.0	-17.3	12	3	1,041	868

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	($000)		% change from		(#)	# chg from	(#)	# chg from
	Mar-04	YTD 04	Mar-03	YTD 03	Mar-04	Mar-03	Mar-04	Mar-03
Vancouver Island/Coast	**17,285**	**42,297**	**3.8**	**8.2**	**404**	**-6**	**15,022**	**-70**
Victoria (C)	8,200	19,433	9.8	12.7	75	1	5,303	-52
Other CRD	1,674	3,978	-12.1	-7.6	76	-6	2,547	128
Nanaimo (C)	1,547	3,781	14.2	8.6	22	-1	1,175	-59
Port Alberni (C)	241	576	6.5	0.1	11	-3	330	-72
Courtenay (C)	750	1,842	5.9	9.0	12	1	515	27
Rest of Development Region	4,873	12,686	-2.4	7.6	220	3	5,152	-42
Mainland/Southwest	**74,323**	**202,145**	**1.3**	**-2.8**	**412**	**-3**	**35,677**	**-68**
Downtown Vancouver (C)	28,560	66,570	25.0	13.1	83	2	12,871	126
Other Vancouver (C)	1,834	5,189	-1.9	3.1	30	-4	2,680	-88
Richmond (C)	7,031	20,019	6.3	7.3	23	1	4,321	70
Other GVRD	5,220	12,756	6.7	3.5	82	-2	4,599	-64
Whistler (DM)	26,113	83,199	-17.3	-15.8	77	1	6,645	5
Rest of Development Region	3,736	9,777	-0.1	2.3	108	15	3,455	-198
Thompson/Okanagan	**15,778**	**43,335**	**6.9**	**7.2**	**433**	**12**	**16,568**	**173**
Penticton (C)	1,147	2,877	32.8	25.9	42	2	1,708	-41
Kamloops (C)	4,400	11,884	18.2	14.2	65	-1	3,587	23
Kelowna (C)	4,516	12,026	1.5	2.4	53	3	3,415	45
Vernon (C)	1,723	5,663	7.1	-0.1	33	2	1,510	122
Revelstoke (C)	1,124	3,252	-19.6	-3.8	25	0	986	-39
Rest of Development Region	2,869	7,634	5.5	10.3	215	6	5,362	63
Kootenay	**7,616**	**21,349**	**-1.6**	**4.2**	**211**	**2**	**6,577**	**-9**
Cranbrook (C)	538	1,363	11.4	5.3	19	-1	892	-14
Rest of Development Region	7,078	19,986	-2.1	4.2	192	3	5,685	5
Cariboo	**3,195**	**7,904**	**6.9**	**5.4**	**116**	**-3**	**4,137**	**-108**
Quesnel (C)	216	609	-9.2	10.2	13	0	452	0
Williams Lake (C)	308	737	6.8	-1.3	11	0	534	-34
Prince George (C)	1,722	4,158	10.4	6.7	27	-2	1,687	-29
Rest of Development Region	949	2,399	5.0	4.2	65	-1	1,464	-45
North Coast	**1,040**	**2,864**	**-7.2**	**1.6**	**60**	**2**	**1,752**	**34**
Prince Rupert (C)	355	1,115	-0.5	6.5	15	1	761	40
Rest of Development Region	351	833	-11.2	-7.3	36	2	644	17
Nechako	**507**	**1,382**	**-15.9**	**-12.5**	**40**	**-1**	**1,088**	**-44**
Smithers (T)	250	656	-10.0	-9.9	12	-1	400	-17
Rest of Development Region	257	726	-21.0	-14.7	28	0	688	271
Northeast	**6,459**	**17,210**	**-5.8**	**6.0**	**68**	**5**	**3,537**	**1029**
Dawson Creek (C)	748	1,787	24.1	31.3	14	-1	488	-11
Fort St. John (C)	2,844	7,797	19.0	18.9	20	1	1,672	93
Rest of Development Region	2,867	7,627	-25.8	-4.9	34	5	1,377	947

Table 5: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Mar-03	16,656	73,364	14,763	7,743	2,990	1,120	603	6,855	124,095
Apr-03	18,409	55,669	11,893	4,344	3,192	1,006	510	3,493	98,516
May-03	24,464	64,094	16,335	4,681	3,780	1,441	666	2,452	117,914
Jun-03	28,787	69,739	21,407	5,635	4,485	2,608	928	2,885	136,475
Jul-03	39,350	86,148	32,863	8,643	5,169	3,103	1,058	3,762	180,097
Aug-03	47,004	101,199	37,026	9,969	5,569	3,107	1,142	3,978	208,993
Sep-03	31,458	72,552	20,022	6,662	4,774	2,338	1,091	3,536	142,433
Oct-03	19,909	52,270	13,801	4,244	3,775	1,207	963	3,455	99,623
Nov-03	12,753	41,418	8,039	2,484	2,622	903	538	2,967	71,724
Dec-03	11,763	59,336	11,652	5,024	2,199	831	454	3,803	95,060
Jan-04	10,890	59,390	12,508	5,766	2,259	791	415	4,428	96,448
Feb-04	14,122	68,432	15,049	7,966	2,450	1,033	459	6,323	115,835
Mar-04	17,285	74,323	15,778	7,618	3,195	1,040	507	6,459	126,202
Year-over-year percent changes									
Mar-03	0.5	-8.6	3.9	3.0	-0.6	3.4	-6.8	61.2	-2.7
Apr-03	2.2	-11.6	9.2	2.2	5.8	6.8	3.6	5.2	-5.2
May-03	-1.1	-4.1	6.3	-2.7	-4.0	-6.1	9.4	28.6	-1.5
Jun-03	-3.3	-15.3	6.0	-3.1	-0.8	0.3	-0.6	16.8	-8.2
Jul-03	-0.6	-10.2	1.7	3.0	-0.5	0.3	0.4	38.1	-4.3
Aug-03	2.5	-3.6	-1.0	-8.9	-6.7	2.7	3.3	31.1	-1.6
Sep-03	2.5	-3.8	-4.5	-7.5	-7.4	-0.6	-1.1	4.5	-2.6
Oct-03	7.0	-5.8	3.1	7.1	1.4	5.2	-6.5	8.4	-0.9
Nov-03	7.1	-0.9	7.6	0.0	-0.5	4.4	-8.1	18.7	2.1
Dec-03	4.6	0.0	12.7	13.6	6.6	27.1	3.0	70.9	4.8
Jan-04	13.9	-4.8	3.2	6.0	0.4	8.0	-6.0	10.5	-0.4
Feb-04	9.7	-5.5	11.3	9.1	8.4	6.9	-14.0	24.7	0.8
Mar-04	3.8	1.3	6.9	-1.6	6.9	-7.2	-15.9	-5.8	1.7

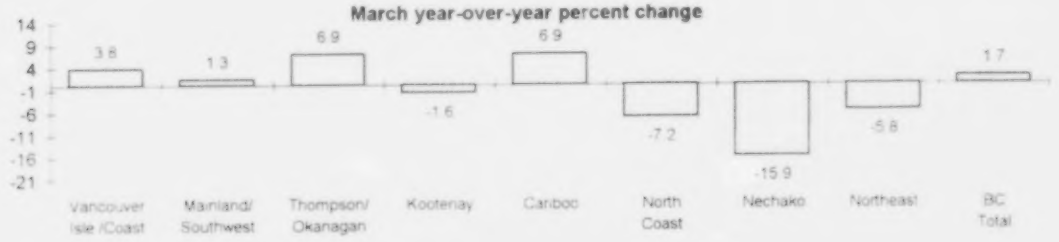


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**
Annual data								
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,960.1	6,583.2	2,808.1	3,787.8	1,376.9	764.0	411.8	118.0
2003	7,329.5	6,125.9	2,584.0	3,553.4	1,203.6	577.6	410.1	124.8
Annual percent changes								
1999	5.4	4.8	7.9	2.0	8.6	9.7	7.8	6.6
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.2	-4.5	-13.8	4.2	-2.9	4.4	-11.7	-10.5
2003	-7.9	-6.9	-8.0	-6.2	-12.6	-24.4	-0.4	5.8
Monthly data								
Apr-03	585.0	494.7	207.6	281.0	90.3	38.4	35.1	9.1
May-03	576.9	492.3	208.5	284.9	84.7	28.1	33.6	10.8
Jun-03	596.2	503.6	210.4	293.7	92.6	36.7	33.1	11.0
Jul-03	608.4	512.2	211.9	297.8	96.2	41.8	33.5	10.4
Aug-03	625.5	522.7	215.3	303.5	102.8	51.8	33.8	10.7
Sep-03	619.2	515.7	215.4	294.9	103.4	51.9	33.6	10.9
Oct-03	614.5	509.1	219.1	294.6	105.5	56.8	33.8	9.8
Nov-03	607.0	501.5	212.6	290.4	105.4	55.6	34.3	10.4
Dec-03	611.3	504.4	211.7	292.1	106.9	56.0	34.1	10.9
Jan-04	593.4	486.5	204.6	283.5	106.9	56.3	33.8	11.4
Feb-04	594.7	487.8	206.0	284.3	106.9	54.4	34.3	11.0
Mar-04	606.2	502.2	210.2	298.3	104.0	56.8	33.9	9.4
Apr-04	619.1	507.7	210.1	299.8	111.5	58.8	33.5	10.9
Month-over-month growth rates								
Apr-03	-1.5	-0.1	2.2	-2.3	-8.6	-26.7	3.9	3.4
May-03	-1.4	-0.5	0.4	1.4	-6.2	-26.8	-4.4	19.5
Jun-03	3.3	2.3	0.9	3.1	9.4	30.4	-1.3	1.8
Jul-03	2.1	1.7	0.7	1.4	3.9	14.0	1.0	-6.0
Aug-03	2.8	2.1	1.6	1.9	6.9	23.8	1.1	3.1
Sep-03	-1.0	-1.3	0.1	-2.8	0.6	0.3	-0.5	1.9
Oct-03	-0.8	-1.3	1.7	-0.1	1.9	9.4	0.6	-10.2
Nov-03	-1.2	-1.5	-3.0	-1.4	0.0	-2.1	1.4	6.7
Dec-03	0.7	0.6	-0.4	0.6	1.4	0.7	-0.6	4.1
Jan-04	-2.9	-3.5	-3.4	-2.9	0.0	0.5	-1.0	4.9
Feb-04	0.2	0.3	0.7	0.3	0.1	-3.3	1.4	-3.7
Mar-04	1.9	3.0	2.1	4.9	-2.8	4.3	-1.2	-14.0
Apr-04	2.1	1.1	-0.1	0.5	7.2	3.5	-1.0	15.0

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns [1]					
	Receipts ($ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
Annual data						
1996	4,054.5	284.7	3,769.9	23,436.2	1,368.9	22,067.3
1997	4,335.2	339.9	3,995.3	24,974.5	1,576.4	23,398.1
1998	4,641.0	398.8	4,242.2	26,993.2	1,805.3	25,187.9
1999	4,467.5	369.8	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
2003	5,388.8	284.4	5,104.3	33,648.9	2,089.1	31,559.8
Annual growth rates						
1999	-3.7	-7.3	-3.4	4.3	12.9	3.6
2000	8.1	-2.9	9.1	7.5	8.4	7.4
2001	7.1	-0.3	7.7	6.6	3.2	6.8
2002	-1.5	-14.6	-0.5	2.8	-1.7	3.1
2003	5.6	-7.0	6.4	1.6	-6.8	2.2
Monthly data						
Mar-03	426	23	403	2,763	177	2,586
Apr-03	430	25	405	2,722	178	2,544
May-03	431	24	407	2,775	173	2,602
Jun-03	430	24	406	2,778	175	2,603
Jul-03	452	24	428	2,793	181	2,612
Aug-03	462	24	438	2,820	174	2,646
Sep-03	463	23	441	2,829	168	2,661
Oct-03	471	22	449	2,867	168	2,698
Nov-03	479	23	456	2,886	169	2,717
Dec-03	477	24	453	2,882	167	2,715
Jan-04	479	22	456	2,870	158	2,712
Feb-04	482	22	459	2,922	166	2,755
Mar-04	491	23	469	2,940	170	2,770
Month-over-month growth rates						
Mar-03	-1.1	-4.8	-0.8	0.0	-1.2	0.0
Apr-03	0.9	6.5	0.6	-1.5	0.5	-1.6
May-03	0.2	-3.7	0.4	1.9	-3.0	2.3
Jun-03	-0.2	1.3	-0.3	0.1	1.3	0.0
Jul-03	5.2	1.2	5.5	0.6	3.5	0.4
Aug-03	2.1	-1.6	2.3	1.0	-3.9	1.3
Sep-03	0.3	-5.9	0.7	0.3	-3.6	0.6
Oct-03	1.6	-2.0	1.8	1.3	0.3	1.4
Nov-03	1.7	1.8	1.7	0.7	0.5	0.7
Dec-03	-0.4	4.7	-0.6	-0.1	-1.4	-0.1
Jan-04	0.3	-5.6	0.6	-0.4	-5.4	-0.1
Feb-04	0.6	0.8	0.6	1.8	5.4	1.6
Mar-04	2.0	0.7	2.1	0.6	2.0	0.5

[1]Source: Statistics Canada & BC Stats

BRITISH COLUMBIA

BC STATS

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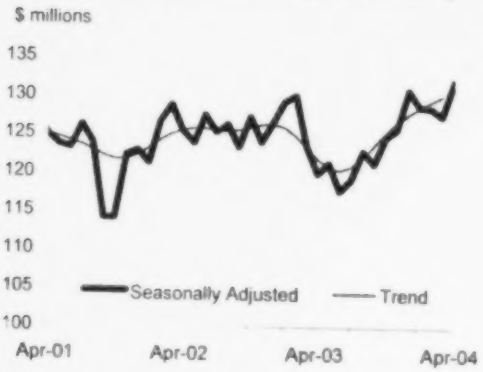
Tourism Sector Monitor ◆ July 2004

Room Revenue

Room revenues in BC rose 3.5%(*seasonally adjusted*) in April, the first increase in room revenues seen since December. Indeed, gains posted in April were more than enough to recover from the downturn in the first three months of the year.

Mainland Southwest was the major engine of revenue growth (+5.7%), supported by the much smaller Northern BC (+9.0%) and Kootenay regions (+6.1%).

Room revenues recover in May



In notable contrast with last month, Thompson-Okanagan (-1.6%) and Cariboo (-4.4%) were the only two regions with falling revenues in April. In March, these two regions were the only places with growing revenues.

Revenues were up at hotels (+1.8%), especially at the largest establishments. Non-standard accommodation types—beach houses, resorts, and the like—bounced back (+7.7%) after a significant decline last month (-7.0%). Motels saw revenues slip 0.7%.

Visitor Entries

Visitor entries posted a second monthly increase in April, rising 2.1% (*seasonally adjusted*). Entries from the US were up 1.1%, largely due to more overnight visits. The number of overseas visitors jumped 7.2%, with strong growth from Asia (+7.2%) and Australia/South Pacific (+25.3%).

Visitor entries edge upward

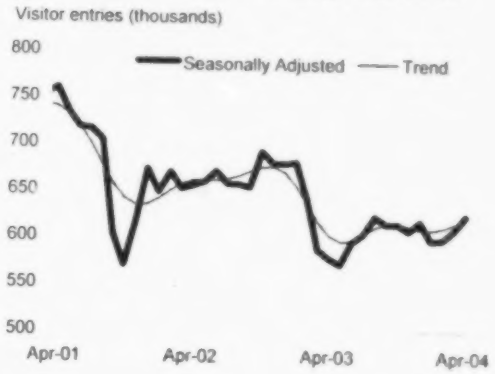


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type	Apr.04 ($000)	Mar.04 ($000)	% change
Total	130,234	127,316	+3.5
Hotels	96,494	94,757	+1.8
Motels	15,675	15,785	-0.7
Other Acc.	18,064	16,775	+7.7
Regions (Top 3 performers)			
Northern BC	7,210	6,616	+9.0
Kootenay	6,562	6,183	+6.1
Mainland Southwest	72,246	68,365	+5.7

Special Focus Article: *Declining Revenues at BC's Drinking Places*

Table 2. Traveller Entries
(seasonally adjusted)

	Apr-04 ('000)	Mar-04 ('000)	% chg from Mar-04
American visitors			
Total	508	502	1.1
Same-day	209	210	-0.1
Overnight	301	299	0.8
Overseas visitors			
Total	111	104	7.2
Europe	34	34	-0.3
UK	16	16	-4.6
Asia	61	57	7.2
Japan	18	19	-6.8
Taiwan	9	8	16.3
Oceania	12	9	25.3

(BC STATS & Statistics Canada)

note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

In the hotel industry, both occupancy (+0.9 percentage points) and room rates (+1.4%) increased in April. Employment in the accommodation sector increased marginally (+0.3%), though overall tourism-related industries saw modest job losses (-0.5%).

The food and beverage service industry also had a strong month, with revenues up 4.1%. Revenues were up at both restaurants (+4.0%) and drinking places (+5.9%).

Transportation indicators round out the picture of a healthy tourism sector. Passenger traffic at Vancouver International Airport was up 1.8%, with similar growth at the Victoria Airport (+2.2%). Coquihalla Highway traffic was unchanged from its seasonal pattern, but BC Ferries passengers increased 2.2%.

The Canadian dollar edged down to US$ 0.74 in April. The currency has depreciated three cents since January – when the Loonie was at an 11-year peak. This trend has eased, at least to some degree, the cost of visiting Canada and should help to strengthen the tourism economy.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Total	Change from month ago
Hotel Industry		
Occupancy rate	61.9	0.9 pp
Average room charge	114.70	1.4%
(Pannell Kerr Forster)		
Airport Passengers	**(000s)**	**(%)**
Vancouver International Airport		
Total traffic	1,299	1.8
US	343	3.4
Other International	309	3.7
Canada	647	0.1
(YVR)		
Victoria International Airport		
Total traffic	105	2.2
(Victoria Airport Authority)		
Restaurant Receipts	**($ millions)**	**(%)**
All establishments	518	4.1
Food service	494	4.0
Drinking places	24	5.9
(Statistics Canada)		
Transportation	**(000s)**	**(%)**
Coquihalla Highway		
Passenger Vehicles	222	0.1
(Ministry of Transportation & Highways)		
BC Ferries		
Vehicle Volume	715	0.0
Passenger Volume	1,871	2.2
(BC Ferries)		
Exchange Rates	**Cdn $**	**Change from month ago**
US $	0.745	-0.01
UK Pound	0.413	0.00
Japanese Yen	80.225	-1.43
Australian $	1.002	0.00
(Statistics Canada)		

note: pp: percentage points

Note to readers: all data in the *Tourism Sector Monitor* are now reported on a **seasonally adjusted** basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues declined 1.1% (seasonally adjusted) in May, retreating after strong growth in April. The decline appeared across the board with every region except Thompson-Okanagan posting lower revenues.

There were fewer passenger vehicles on the Coquihalla Highway (-2.7%) and aboard BC Ferries (-1.6%). Employment in key tourism related industries was basically unchanged (+0.1%).

On the other hand, visitor entries continued to rise in May (+1.4%). The number of overseas visitors soared 12.7%, offsetting a decline in US entries (-1.1%). Most of the decline in US visitors was due to a drop in same-day cross-border trips (-3.1%).

However, it would seem that the increase in international visitors was not enough to give a boost to the tourism economy in May.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a two-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a one-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

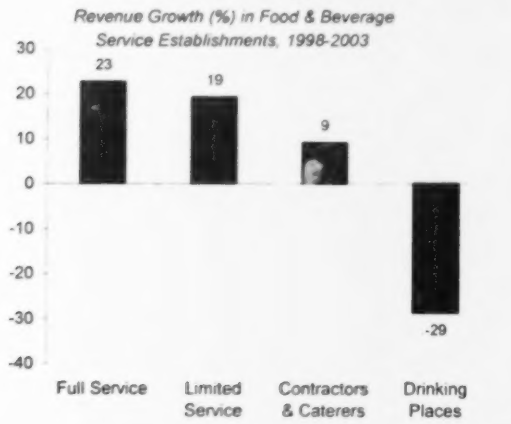
Special Focus:
Declining Revenues at BC's Drinking Places

British Columbia's food and beverage service industry has been enjoying strong growth in revenues in recent years. However, one sector of the industry, drinking places, has been sharply battered over the last half decade. This article examines the downturn and considers a number of possible causes, including prices, the smoking ban, and competition from other establishments.

Drinking places in decline

Revenues at drinking places in BC have plummeted 29% since 1998, representing a drop of $144 million. Over 30 establishments (6%) have withdrawn from the market in the last five years, and revenues per establishment have fallen 24%.

Revenues have fallen sharply at BC drinking places



Source: Statistics Canada

This is in striking contrast with establishments that primarily serve food.

At full service restaurants, revenues have expanded 23%. At limited service "fast food" restaurants, revenues are up 19%. Even food service contractors and caterers have seen revenue growth (+9%). Thus, drinking places are the one weak spot in the food and beverage service industry.

There are several possible factors in the decline of drinking places in BC, including general trends in prices and consumption of alcohol, the WCB ban on smoking in bars, and growing competition from licenced restaurants.

1. Overall alcohol sales

Total expenditures on alcohol in BC have shown relatively slow growth in recent years. On a per capita basis, total alcohol sales rose 10% between 1998 and 2002. This was the slowest growth of liquor sales among the provinces, and is roughly half the national average (+19%). This limited growth in demand for alcohol suggests a partial reason why drinking places are in difficult times.

2. Liquor prices

BC has some of the highest liquor prices in Canada. Statistics Canada's inter-city price index provides data on the liquor prices in 11 major cities in Canada. Prices in Vancouver, in October 2002, were 4% higher than the 11-city average.

Only the east coast cities of St John's and Halifax had higher alcohol prices (5% above average) than Vancouver. The lowest alcohol prices are in Regina (6% below average) and Winnipeg (16% below average).

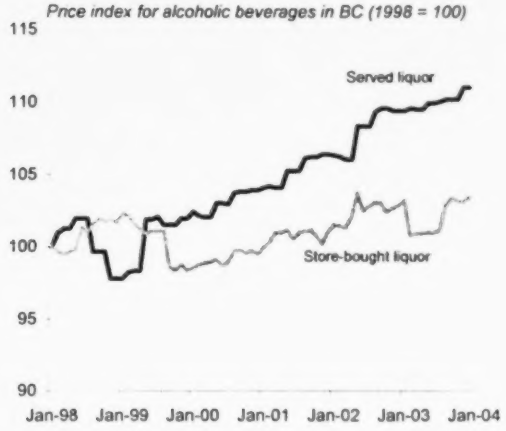
Nevertheless, liquor prices in BC, while comparatively high, have been fairly stable in recent years. Alcohol prices rose 4.3% between 1998 and 2003, below the overall rate of inflation (9.5%). This suggests that price has not been the cause of slow alcohol sales in BC.

However, there is a growing gap between the price of store-bought liquor and liquor served in establishments.

Alcohol purchased in stores has had price increases of only 1.3% between 1998 and

2003.[1] However, the price of served liquor over the same period rose 9.7%. Thus, the cost of "going out for drinks" has risen significantly compared to "having friends over for drinks". This increasingly unfavourable price comparison has likely hurt drinking places in BC.

Price of served liquor rising faster than store-bought liquor



Source: Statistics Canada

3. The smoking ban

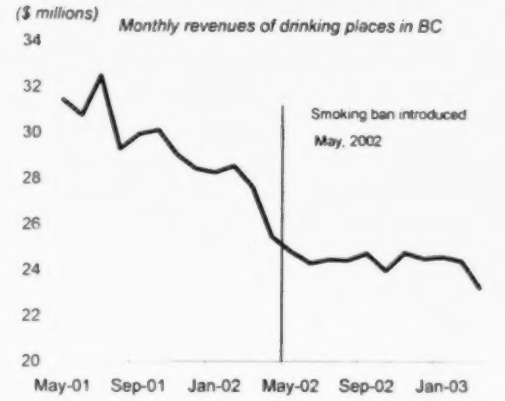
The smoking ban on the food and beverage service industry is another possible factor in the decline of drinking places. Drinking and smoking are often done together, which could make a smoking ban in bars and nightclubs particularly burdensome.

When the Workers Compensation Board first imposed the ban in January 2000, it provoked a sharp reaction from industry. Two and a half months later, the BC Supreme Court ruled that the WCB had failed to adequately consult with stakeholders, and overturned the ban.

A study commissioned by the WCB concluded that the two and a half month ban did produce a short-term decline in the liquor service industry.[2]

The smoking ban was re-introduced in May 2002. However, this date does not correspond to a drop in the revenues of drinking places.

The smoking ban did not spark a decline in revenues



Source: Statistics Canada

The decline in revenues at drinking places occurred *prior* to the enactment of the smoking ban, and revenues have been relatively stable since then. It seems that the smoking ban did not have a negative impact on the revenues of BC drinking places.

4. Competition from licenced restaurants

Nightclubs and some bars offer a very distinctive "product." However, pubs are often not very different from licenced restaurants.

The distinction between pubs and licenced restaurants is largely a creation of the liquor control laws. In principle, licenced restaurants can only serve alcohol as an accompaniment to a meal. At pubs, food can be served as an accompaniment to alcohol, or served not at all. Pubs exist largely because restaurants are not legally permitted to serve alcohol without food. And liquor control legislation takes this issue quite seriously.

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[1] In the beginning of 2004, there was a 3.9% increase in liquor prices, set by the BC Liquor Distribution Branch.

[2] *Pacific Analytics. 2001. "The Economic Impacts of the Proposed Amendment to the ETS Regulation." Prepared for the Workers Compensation Board of British Columbia.* This study was based on provincial liquor sales, rather than establishment revenues.

For a licenced restaurant, serving alcohol without food (qualifications noted below) is one of the most serious offences under the *Liquor Control and Licensing Act*. A first offence can result in a maximum $10,000 fine and/or a 15-day suspension. In contrast, many of the "public safety" elements in the liquor laws carry significantly lower penalties—including offences such as overcrowding the establishment, serving alcohol to intoxicated patrons, and even serving alcohol to minors. These violations can result in a maximum $7,000 fine and/or a 7-day suspension. [3]

Nevertheless, there are regulatory loopholes in the liquor control laws, and restrictions on restaurants are gradually being relaxed.

Traditionally, restaurants have been allowed to set aside 10% of their seating as a lounge where people can order drinks without food. Changes to the legislation in recent years allow for 20% of restaurant space to be designated as a lounge—doubling the lounge space previously allowed. As restaurants incorporate the new law into their floor plans, they will likely continue to claim market share from pubs.

As well, there is the 'intention to order food' loophole that allows restaurants to serve thirsty patrons not interested in a meal.

In order to serve alcohol, restaurant staff must *believe* that a customer *intends* to order food. This frequently leads to a game in which the customer asks for a menu and a drink, but eventually decides not to order food. Two drinks can be served before a customer has to order food, and even then ordering a side of French fries or carrot sticks can minimally satisfy the restriction.

Through the allowance for restaurant lounge space and the 'intention to order' game, licenced restaurants are able to operate much like a pub, and it seems that restaurants are increasingly competing with liquor primary establishments.

This would suggest that a significant portion of the decline in the revenues of drinking places does not represent a "weakness" in the food and beverage service industry. Rather, it may be more related to a competitive redistribution of market share, which explains in part the strong growth of revenues at full service restaurants.

However, without more detailed data—information about licenced vs. unlicensed restaurants, nightclubs vs. pubs, etc—this account cannot be definitively established.

Conclusion

In the food and beverage service industry, drinking places have been the one weak spot, with revenues falling 29% over the last five years.

Overall spending on alcoholic beverages has not been as robust in BC as in other provinces. As well, the price of served liquor (+9.7%) has been rising much faster than the price of store-bought liquor (+1.3%) over the past five years. However, neither of these facts provide an adequate account of why drinking places have seen such a steep decline in revenues.

The introduction of the smoking ban, which might be expected to be a particular burden on drinking places, was a possible factor. However, the downturn in revenues largely occurred before the smoking ban was enacted.

Competition from licenced restaurants has probably been the main factor in the declining revenues and market share of drinking places.

[3] Liquor Control and Licensing Regulation. Schedule 4.

Table 1: Room Revenue by Development Region ($000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Apr-03	22,771	63,963	17,588	5,887	3,630	1,602	726	3,795	119,960
May-03	22,171	66,428	17,420	5,750	3,552	1,516	750	3,734	121,321
Jun-03	21,864	63,120	17,583	5,810	3,632	1,558	714	3,468	117,749
Jul-03	21,918	64,505	17,171	5,911	3,533	1,579	724	3,894	119,235
Aug-03	22,554	67,407	17,266	5,750	3,543	1,633	727	3,962	122,842
Sep-03	22,466	66,933	16,682	5,716	3,487	1,605	728	3,630	121,247
Oct-03	23,398	67,465	17,862	6,159	3,778	1,602	756	3,742	124,762
Nov-03	23,516	68,529	18,057	5,972	3,672	1,633	714	3,717	125,811
Dec-03	23,910	69,809	19,769	6,562	3,760	1,759	728	4,550	130,846
Jan-04	25,385	68,407	18,765	6,363	3,566	1,686	715	3,865	128,751
Feb-04	23,960	68,998	18,650	6,514	3,682	1,653	720	4,397	128,574
Mar-04	23,702	68,365	18,868	6,183	3,836	1,591	618	4,406	127,569
Apr-04	23,809	72,246	18,566	6,562	3,669	1,666	792	4,752	132,063
Month-over-month growth rates									
Apr-03	0.1	-3.9	1.6	-6.3	1.9	-7.6	-4.2	-19.0	-2.9
May-03	-2.6	3.9	-1.0	-2.3	-2.1	-5.3	3.4	-1.6	1.1
Jun-03	-1.4	-5.0	0.9	1.0	2.2	2.8	-4.8	-7.1	-2.9
Jul-03	0.2	2.2	-2.3	1.7	-2.7	1.3	1.3	12.3	1.3
Aug-03	2.9	4.5	0.6	-2.7	0.3	3.5	0.4	1.7	3.0
Sep-03	-0.4	-0.7	-3.4	-0.6	-1.6	-1.8	0.2	-8.4	-1.3
Oct-03	4.1	0.8	7.1	7.7	8.3	-0.2	3.8	3.1	2.9
Nov-03	0.5	1.6	1.1	-3.0	-2.8	1.9	-5.6	-0.7	0.8
Dec-03	1.7	1.9	9.5	9.9	2.4	7.7	1.9	22.4	4.0
Jan-04	6.2	-2.0	-5.1	-3.0	-5.2	-4.2	-1.8	-15.0	-1.6
Feb-04	-5.6	0.9	-0.6	2.4	3.3	-1.9	0.7	13.7	-0.1
Mar-04	-1.1	-0.9	1.2	-5.1	4.2	-3.7	-14.1	0.2	-0.8
Apr-04	0.5	5.7	-1.6	6.1	-4.4	4.7	28.0	7.8	3.5

April month-over-month percent growth

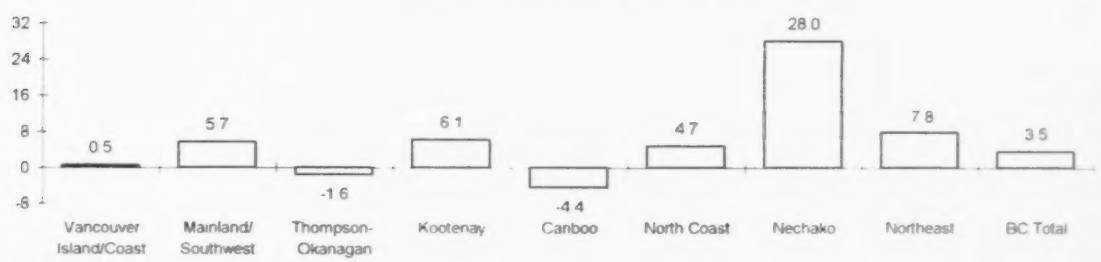

Table 2: Room Revenue by Accommodation Type ($000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			
Annual data							
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
Annual growth rates							
1999	5.4	15.3	15.3	12.9	2.2	19.2	12.0
2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
Monthly data							
Apr-03	34,914	14,891	24,247	14,296	15,096	9,014	7,012
May-03	35,467	14,499	23,975	14,465	14,673	10,083	7,554
Jun-03	33,464	14,126	24,120	14,260	14,940	9,841	7,617
Jul-03	33,898	14,346	24,111	14,254	14,599	9,893	7,635
Aug-03	36,937	14,958	24,808	14,580	14,662	9,889	7,611
Sep-03	35,624	14,965	24,675	14,235	13,940	9,507	7,808
Oct-03	36,545	15,458	25,488	14,752	15,759	9,831	7,930
Nov-03	36,496	15,683	25,764	14,605	15,320	10,145	7,649
Dec-03	38,590	16,002	25,494	14,867	16,843	10,482	8,858
Jan-04	36,941	15,788	25,785	15,056	15,571	9,701	8,285
Feb-04	36,902	15,466	25,854	14,702	15,660	9,839	8,193
Mar-04	38,008	16,031	25,947	14,770	15,785	9,298	7,477
Apr-04	39,378	15,497	26,473	15,146	15,675	9,611	8,454
Month-over-month growth rates							
Apr-03	-1.8	2.0	0.1	-0.1	0.2	-13.9	-24.0
May-03	1.6	-2.6	-1.1	1.2	-2.8	11.9	7.7
Jun-03	-5.6	-2.6	0.6	-1.4	1.8	-2.4	0.8
Jul-03	1.3	1.6	0.0	0.0	-2.3	0.5	0.2
Aug-03	9.0	4.3	2.9	2.3	0.4	0.0	-0.3
Sep-03	-3.6	0.0	-0.5	-2.4	-4.9	-3.9	2.6
Oct-03	2.6	3.3	3.3	3.6	13.0	3.4	1.6
Nov-03	-0.1	1.5	1.1	-1.0	-2.8	3.2	-3.5
Dec-03	5.7	2.0	-1.0	1.8	9.9	3.3	15.8
Jan-04	-4.3	-1.3	1.1	1.3	-7.6	-7.5	-6.5
Feb-04	-0.1	-2.0	0.3	-2.3	0.6	1.4	-1.1
Mar-04	3.0	3.7	0.4	0.5	0.8	-5.5	-8.7
Apr-04	3.6	-3.3	2.0	2.5	-0.7	3.4	13.1

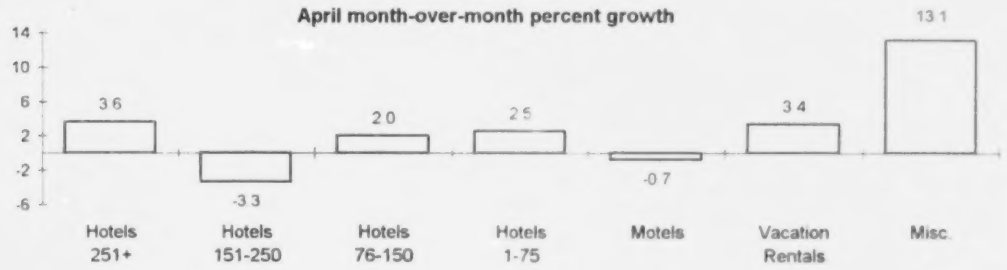

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Apr-04	Revenue ($000) YTD 04	Revenue % change from Apr-03	Revenue % change from YTD 03	Properties (#) Apr-04	Properties # chg from Apr-03	Rooms (#) Apr-04	Rooms # chg from Apr-03
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	11,522	34,934	4.5	7.2	156	-3	7,880	1
Total - Hotels	9,660	29,682	4.4	9.6	65	-3	5,279	-75
76+ Rooms	7,506	23,116	6.5	13.3	25	0	3,701	0
1-75 Rooms	2,154	6,566	-2.3	-1.5	40	-3	1,578	-75
Motels	926	2,927	3.5	0.7	28	-1	1,061	7
Vacation Rentals	319	854	-9.7	-26.5	21	-1	298	5
19 Cowichan Valley								
Total - All accommodation types	624	1,921	13.9	8.1	33	1	640	4
Motels	142	517	10.3	22.3	15	0	296	0
21 Nanaimo								
Total - All accommodation types	2,609	8,760	5.5	6.4	64	-3	2,467	-251
Total - Hotels	1,427	4,957	15.0	11.9	19	-1	1,224	-191
Motels	502	1,663	1.8	4.1	21	-1	559	-52
Vacation Rentals	572	1,864	-8.7	-1.9	18	0	562	-3
23 Alberni-Clayoquot								
Total - All accommodation types	2,396	6,975	12.5	6.7	58	1	1,341	-46
Total - Hotels	697	1,959	30.4	17.9	11	1	390	-28
Motels	217	608	5.8	-4.0	20	-1	405	-10
Vacation Rentals	837	2,429	5.0	-1.3	12	3	286	29
25 Comox-Strathcona								
Total - All accommodation types	1,843	6,905	7.1	6.0	57	-3	1,680	-90
Motels	537	1,941	7.1	9.3	24	-1	654	-8
Vacation Rentals	98	818	-0.5	2.6	13	0	155	-17
27 Powell River								
Total - All accommodation types	238	1,387	14.9	81.7	15	0	331	-23
43 Mount Waddington								
Total - All accommodation types	196	741	-25.8	-20.4	18	2	555	106
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	2,740	10,430	5.7	6.7	61	1	2,441	14
Total - Hotels	2,102	7,665	4.4	6.5	21	1	1,430	16
Motels	559	1,703	10.2	10.0	34	0	894	-4
15 Greater Vancouver								
Total - All accommodation types	44,732	153,914	20.7	12.5	225	-8	25,992	-243
Total - Hotels	42,882	147,058	22.1	13.4	155	-7	23,133	-201
251+ Rooms	24,269	81,330	27.5	15.0	25	0	9,956	0
151-250 Rooms	7,533	27,938	11.4	11.0	25	0	4,752	-1
76-150 Rooms	8,518	28,563	19.9	11.2	54	0	5,849	3
1-75 Rooms	2,562	9,227	14.9	14.0	51	-7	2,576	-203
Motels	1,116	3,857	-6.1	-5.1	36	-2	1,536	-95
Vacation Rentals	489	2,055	8.2	5.3	16	1	576	51
29 Sunshine Coast								
Total - All accommodation types	260	799	1.4	2.6	21	0	352	-28
31 Squamish-Lillooet								
Total - All accommodation types	15,750	100,506	-9.1	-13.6	96	2	7,117	42
Total - Hotels	12,786	79,917	0.0	-12.3	44	1	5,413	30
76+ Rooms	11,721	73,075	-1.3	-12.8	25	0	4,676	4
1-75 Rooms	1,065	6,843	17.7	-6.7	19	1	737	26
Vacation Rentals	2,146	14,946	4.6	-17.4	27	1	1,195	16
Miscellaneous	674	5,180	-10.7	-22.4	16	0	292	-4
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	1,963	6,090	11.2	17.6	100	0	3,003	-146
Total - Hotels	1,185	3,806	4.3	11.9	16	-2	1,159	-115
Motels	672	1,772	29.0	33.6	39	1	1,634	18
33 Thompson-Nicola								
Total - All accommodation types	3,526	17,434	4.3	11.4	138	-6	5,281	-47
Total - Hotels	1,893	7,532	6.2	17.2	36	1	2,249	46
76+ Rooms	1,576	6,250	6.6	21.4	12	0	1,389	0
1-75 Rooms	317	1,282	4.4	0.1	24	1	860	46
Motels	1,195	3,620	2.1	8.4	74	-3	2,243	-45
Vacation Rentals	218	5,172	5.3	8.5	11	-3	400	-71

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000)		Revenue % change from		Properties (#)	Properties # chg from	Rooms (#)	Rooms # chg from
	Apr-04	YTD 04	Apr-03	YTD 03	Apr-04	Apr-03	Apr-04	Apr-03
35 Central Okanagan								
Total - All accommodation types	4,276	16,960	12.0	5.5	59	4	3,553	44
Total - Hotels	3,090	11,050	11.6	6.1	21	-1	1,912	-27
Motels	839	2,372	12.2	9.6	25	2	1,127	55
37 North Okanagan								
Total - All accommodation types	913	6,656	-17.1	-2.5	44	1	1,663	63
Total - Hotels	518	4,470	-22.2	-10.6	15	0	824	0
Motels	359	1,283	4.7	29.7	19	1	642	105
39 Columbia-Shuswap								
Total - All accommodation types	2,006	8,932	9.8	4.4	90	0	2,904	-194
Total - Hotels	823	3,417	13.7	7.8	17	-2	1,020	-215
Motels	761	2,704	11.1	9.6	45	1	1,511	30
Miscellaneous	374	2,479	1.5	-4.6	23	2	309	-4
Kootenay								
01 East Kootenay								
Total - All accommodation types	3,371	19,866	11.2	5.9	104	-2	4,154	-274
Total - Hotels	1,167	6,421	10.4	2.0	25	-1	1,514	-14
Motels	671	2,583	4.3	4.1	49	-3	1,163	-71
Vacation Rentals	755	5,764	33.5	21.2	14	2	859	55
03 Central Kootenay								
Total - All accommodation types	1,172	4,449	15.5	6.1	70	2	1,501	6
Total - Hotels	699	2,480	12.4	8.3	15	1	695	32
Motels	271	909	20.3	-8.4	28	-2	519	-51
Vacation Rentals	59	197	50.8	23.9	12	1	94	6
05 Kootenay Boundary								
Total - All accommodation types	382	1,971	28.4	5.8	31	1	643	13
Motels	228	803	26.5	6.1	22	1	370	13
Cariboo								
41 Cariboo								
Total - All accommodation types	1,093	3,565	5.9	6.4	67	0	1,785	-21
Total - Hotels	394	1,173	12.4	12.0	11	1	524	15
Motels	629	2,050	3.5	4.7	36	-2	1,024	-91
Vacation Rentals	10	52	16.9	-1.7	11	1	149	54
53 Fraser-Fort George								
Total - All accommodation types	2,130	7,591	-1.4	3.4	49	-1	2,390	-56
Total - Hotels	1,541	5,545	-4.6	4.1	18	0	1,392	0
Motels	529	1,659	9.4	3.7	27	0	951	4
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	463	1,788	4.5	7.8	33	2	998	47
Motels	121	482	20.3	18.1	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	593	2,132	5.5	-1.5	30	4	769	21
Motels	222	746	-9.1	-16.0	16	2	379	7
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	545	1,927	7.0	-7.8	42	-4	1,098	-89
Motels	302	1,101	7.1	-10.0	24	-2	639	-46
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	4,449	21,659	27.4	11.5	66	4	3,459	970
Total - Hotels	1,368	9,187	-4.7	24.4	21	2	1,504	168
Motels	746	3,905	-2.5	11.2	33	1	924	23

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	($000)		% change from		(#)	# chg from	(#)	# chg from
	Apr-04	YTD 04	Apr-03	YTD 03	Apr-04	Apr-03	Apr-04	Apr-03
Vancouver Island/Coast	**19,486**	**61,785**	**5.8**	**7.4**	**407**	**-4**	**14,997**	**-285**
Victoria (C)	9,331	28,765	4.4	9.9	74	0	5,288	-70
Other CRD	2,190	6,169	5.2	-3.4	82	-3	2,592	71
Nanaimo (C)	1,433	5,214	9.7	8.9	20	-1	1,137	-59
Port Alberni (C)	205	782	2.7	1.0	12	1	335	-12
Courtenay (C)	636	2,478	2.1	7.1	10	-1	403	-50
Rest of Development Region	5,690	18,377	8.2	7.8	219	-1	5,242	-165
Mainland/Southwest	**63,482**	**265,649**	**14.0**	**0.7**	**403**	**-5**	**35,902**	**-215**
Downtown Vancouver (C)	29,054	95,624	26.6	16.9	83	-3	12,866	-101
Other Vancouver (C)	1,998	7,190	8.2	4.5	31	-3	2,687	-79
Richmond (C)	6,423	26,441	9.5	7.8	23	1	4,321	70
Other GVRD	4,668	17,430	1.2	2.9	76	-3	4,483	-133
Whistler (DM)	15,245	98,454	0.9	-13.5	73	2	6,561	65
Rest of Development Region	3,505	13,282	0.0	1.7	105	16	3,349	-442
Thompson/Okanagan	**12,684**	**56,072**	**6.6**	**7.2**	**432**	**-1**	**16,409**	**-280**
Penticton (C)	1,189	4,066	4.3	18.7	43	0	1,748	-86
Kamloops (C)	2,826	14,717	5.9	12.6	62	-2	3,562	22
Kelowna (C)	3,920	15,946	10.0	4.2	50	5	3,105	50
Vernon (C)	854	6,517	-18.4	-3.0	34	1	1,518	63
Revelstoke (C)	872	4,147	4.7	-1.6	26	-1	1,020	-210
Rest of Development Region	3,022	10,678	14.3	11.7	217	-4	5,456	-119
Kootenay	**4,926**	**26,286**	**13.4**	**5.9**	**205**	**1**	**6,298**	**-255**
Cranbrook (C)	514	1,878	-0.8	3.6	16	-2	758	-65
Rest of Development Region	4,411	24,409	15.3	6.1	189	3	5,540	-190
Cariboo	**3,223**	**11,156**	**1.0**	**4.3**	**116**	**-1**	**4,175**	**-77**
Quesnel (C)	350	960	26.6	15.7	13	-1	452	-25
Williams Lake (C)	350	1,067	1.1	-0.6	10	-1	502	-66
Prince George (C)	1,711	5,898	-2.6	4.3	26	0	1,672	4
Rest of Development Region	811	3,210	-0.1	3.1	67	1	1,549	10
North Coast	**1,056**	**3,920**	**5.0**	**2.5**	**63**	**6**	**1,767**	**68**
Prince Rupert (C)	366	1,481	1.4	5.2	16	1	773	40
Rest of Development Region	317	1,149	10.8	-2.9	35	3	581	-12
Nechako	**545**	**1,927**	**7.0**	**-7.8**	**42**	**-4**	**1,098**	**-89**
Smithers (T)	274	930	4.6	-6.1	12	-2	397	-24
Rest of Development Region	271	997	9.4	-9.3	30	-2	701	280
Northeast	**4,449**	**21,659**	**27.4**	**11.5**	**66**	**4**	**3,459**	**970**
Dawson Creek (C)	364	2,151	-2.7	23.9	14	-1	488	-11
Fort St. John (C)	1,253	9,050	1.9	16.2	20	1	1,545	93
Rest of Development Region	2,831	10,458	49.8	5.6	32	4	1,426	888

Table 5: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Apr-03	18,409	55,669	11,893	4,344	3,192	1,006	510	3,493	98,516
May-03	24,464	64,094	16,335	4,681	3,780	1,441	666	2,452	117,914
Jun-03	28,787	69,739	21,407	5,635	4,485	2,608	928	2,885	136,475
Jul-03	39,350	86,148	32,863	8,643	5,169	3,103	1,058	3,762	180,097
Aug-03	47,004	101,199	37,026	9,969	5,569	3,107	1,142	3,978	208,993
Sep-03	31,458	72,552	20,022	6,662	4,774	2,338	1,091	3,536	142,433
Oct-03	19,909	52,270	13,801	4,244	3,775	1,207	963	3,455	99,623
Nov-03	12,753	41,418	8,039	2,484	2,622	903	538	2,967	71,724
Dec-03	11,763	59,339	11,652	5,024	2,199	831	454	3,803	95,060
Jan-04	10,890	59,392	12,523	5,766	2,259	791	415	4,428	96,464
Feb-04	14,122	68,436	15,074	7,966	2,450	1,033	459	6,323	115,864
Mar-04	17,286	74,339	15,792	7,628	3,224	1,040	507	6,459	126,275
Apr-04	19,486	63,482	12,684	4,926	3,223	1,056	545	4,449	109,851
Year-over-year percent changes									
Apr-03	2.2	-11.6	9.2	2.2	5.8	6.8	3.6	5.2	-5.2
May-03	-1.1	-4.1	6.3	-2.7	-4.0	-6.1	9.4	28.6	-1.5
Jun-03	-3.3	-15.3	6.0	-3.1	-0.8	0.3	-0.6	16.8	-8.2
Jul-03	-0.6	-10.2	1.7	3.0	-0.5	0.3	0.4	38.1	-4.3
Aug-03	2.5	-3.6	-1.0	-8.9	-6.7	2.7	3.3	31.1	-1.6
Sep-03	2.5	-3.8	-4.5	-7.5	-7.4	-0.6	-1.1	4.5	-2.6
Oct-03	7.0	-5.8	3.1	7.1	1.4	5.2	-6.5	8.4	-0.9
Nov-03	7.1	-0.9	7.6	0.0	-0.5	4.4	-8.1	18.7	2.1
Dec-03	4.6	0.0	12.7	13.6	6.6	27.1	3.0	70.9	4.8
Jan-04	13.9	-4.6	3.3	6.0	0.4	8.0	-6.0	10.5	-0.4
Feb-04	9.7	-5.5	11.5	9.1	8.4	6.9	-14.0	24.7	0.8
Mar-04	3.8	1.3	7.0	-1.5	7.8	-7.2	-15.9	-5.8	1.8
Apr-04	5.8	14.0	6.6	13.4	1.0	5.0	7.0	27.4	11.5

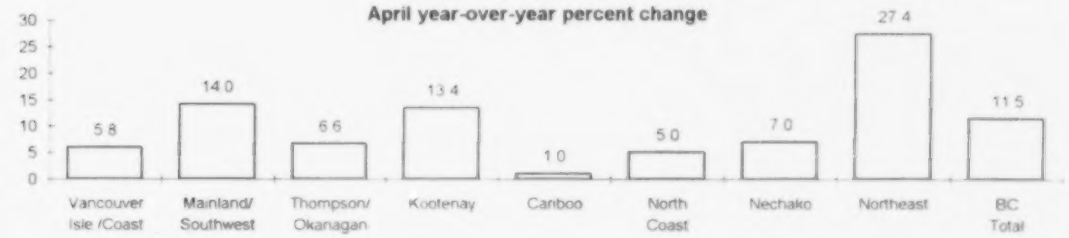

Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International						
	Total	USA		Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**
Annual data								
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,960.1	6,583.2	2,808.1	3,787.8	1,376.9	764.0	411.8	118.0
2003	7,329.5	6,125.9	2,584.0	3,553.4	1,203.6	577.6	410.1	124.8
Annual percent changes								
1999	5.4	4.8	7.9	2.0	8.6	9.7	7.8	6.6
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.2	-4.5	-13.8	4.2	-2.9	4.4	-11.7	-10.5
2003	-7.9	-6.9	-8.0	-6.2	-12.6	-24.4	-0.4	5.8
Monthly data								
May-03	576.9	492.3	210.1	283.4	84.7	28.0	32.7	10.5
Jun-03	596.2	503.6	210.9	292.8	92.6	37.2	32.7	10.9
Jul-03	608.4	512.2	212.1	297.5	96.2	42.3	33.4	10.2
Aug-03	625.5	522.7	215.5	303.4	102.8	49.2	33.8	10.6
Sep-03	619.2	515.7	215.5	294.8	103.4	50.7	33.6	10.8
Oct-03	614.5	509.1	219.0	294.6	105.5	58.0	33.8	9.8
Nov-03	607.0	501.5	212.4	290.3	105.4	55.6	34.3	10.4
Dec-03	611.3	504.4	211.4	292.2	106.9	56.0	34.2	10.9
Jan-04	593.4	486.5	203.8	283.9	106.9	56.2	34.0	11.5
Feb-04	594.7	487.8	205.6	285.2	106.9	55.8	34.6	11.2
Mar-04	606.2	502.2	209.5	299.0	104.0	57.4	34.4	9.4
Apr-04	619.1	507.7	209.4	301.4	111.5	61.5	34.3	11.8
May-04	627.8	502.2	202.8	300.6	125.6	63.3	37.4	13.4
Month-over-month growth rates								
May-03	-1.4	-0.5	1.4	0.4	-6.2	-27.3	-8.2	8.5
Jun-03	3.3	2.3	0.4	3.3	9.4	32.9	0.0	3.7
Jul-03	2.1	1.7	0.6	1.6	3.9	13.7	2.2	-5.7
Aug-03	2.8	2.1	1.6	2.0	6.9	16.4	1.0	3.2
Sep-03	-1.0	-1.3	0.0	-2.8	0.6	3.0	-0.6	2.0
Oct-03	-0.8	-1.3	1.6	-0.1	1.9	14.4	0.5	-9.2
Nov-03	-1.2	-1.5	-3.1	-1.4	0.0	-4.1	1.5	6.2
Dec-03	0.7	0.6	-0.4	0.6	1.4	0.6	-0.2	4.6
Jan-04	-2.9	-3.5	-3.6	-2.9	0.0	0.4	-0.7	5.8
Feb-04	0.2	0.3	0.9	0.5	0.1	-0.7	2.0	-2.6
Mar-04	1.9	3.0	1.9	4.8	-2.8	2.8	-0.6	-16.1
Apr-04	2.1	1.1	-0.1	0.8	7.2	7.2	-0.3	25.3
May-04	1.4	-1.1	-3.1	-0.3	12.7	3.0	9.0	13.5

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquihalla Hwy
	Total	Domestic	Trans-border	Other Int'l.	Total	Vehicles	Passengers	Passenger Vehicles
Annual data								
1999	15,807	8,314	4,120	3,373	1,191.4	7,852	21,369	2,388
2000	16,033	8,306	4,074	3,652	1,139.1	7,887	21,280	2,400
2001	15,477	7,868	4,001	3,608	1,158.2	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102.1	8,272	21,540	2,530
2003	14,321	7,266	3,814	3,241	1,183.0	8,263	21,339	2,480
Annual growth rates								
1999	1.9	1.2	-0.1	6.4	-1.9	0.4	-0.2	0.5
2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
Monthly data								
Apr-03	1,078	563	287	228	92.8	677	1,757	209
May-03	1,084	568	306	210	94.4	684	1,754	208
Jun-03	1,126	580	314	232	94.4	695	1,786	220
Jul-03	1,178	602	320	256	99.5	697	1,789	211
Aug-03	1,224	617	333	274	101.2	700	1,812	200
Sep-03	1,214	614	319	280	102.1	698	1,792	196
Oct-03	1,230	624	317	289	104.9	694	1,785	217
Nov-03	1,257	633	326	298	104.1	690	1,767	197
Dec-03	1,271	645	325	302	106.3	645	1,678	209
Jan-04	1,253	631	323	300	104.6	679	1,750	198
Feb-04	1,278	648	330	300	106.3	708	1,814	213
Mar-04	1,276	646	332	298	102.7	715	1,830	221
Apr-04	1,299	647	343	309	105.0	715	1,871	222
Month-over-month growth rates								
Apr-03	-11.3	-6.0	-11.7	-21.9	-1.8	-0.3	-0.4	13.7
May-03	0.6	0.8	6.8	-7.8	1.7	1.1	-0.2	-0.6
Jun-03	3.8	2.1	2.4	10.4	0.0	1.5	1.8	5.7
Jul-03	4.6	3.9	1.9	10.2	5.4	0.3	0.2	-4.0
Aug-03	4.0	2.4	4.3	7.1	1.7	0.4	1.3	-5.2
Sep-03	-0.9	-0.4	-4.2	2.1	0.9	-0.4	-1.1	-1.8
Oct-03	1.3	1.6	-0.8	3.3	2.7	-0.5	-0.4	10.8
Nov-03	2.2	1.4	2.8	3.2	-0.8	-0.7	-1.0	-9.6
Dec-03	1.1	1.8	-0.2	1.1	2.1	-6.5	-5.0	6.2
Jan-04	-1.4	-2.1	-0.8	-0.7	-1.6	5.3	4.3	-4.9
Feb-04	2.0	2.6	2.2	0.3	1.6	4.3	3.7	7.1
Mar-04	-0.1	-0.2	0.6	-0.9	-3.4	0.9	0.9	4.2
Apr-04	1.8	0.1	3.4	3.7	2.2	0.0	2.2	0.1

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Key industries in tourism sector					Hotel Industry[2]		Consumer Price Index[1]	
	Total tourism related	Air transport[4]	Accom-modation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%)[3]	Room Rate ($)	Traveller accom-modation	Restaurant food[4]
Annual data									
1999	181.7	15.3	29.2	110.1	27.1	61.7	112.02	133.1	115.6
2000	188.4	14.8	28.2	116.7	28.8	60.0	114.05	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	116.98	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	115.03	111.9	127.6
Annual Growth Rates									
1999	-1.5	-3.6	-0.5	0.4	-8.5	-0.2	3.1	2.4	1.5
2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.7	0.7	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-1.7	-9.9	1.8
Monthly data									
Apr-03	193.8	12.7	29.1	117.9	34.1	56.4	114.20	114.7	126.9
May-03	192.8	12.8	29.1	117.0	33.9	57.2	114.80	112.1	127.0
Jun-03	193.7	13.4	28.7	116.6	35.0	56.6	112.40	110.5	127.3
Jul-03	193.1	12.7	28.8	117.9	33.6	56.9	113.10	109.2	127.7
Aug-03	193.3	12.5	29.5	117.6	33.6	59.1	113.30	109.0	128.1
Sep-03	190.1	12.7	29.2	115.2	33.0	57.7	114.30	106.9	128.1
Oct-03	189.3	12.6	28.5	116.2	31.9	59.7	114.90	109.0	128.2
Nov-03	192.5	12.6	28.5	118.2	33.3	60.5	114.30	108.2	128.7
Dec-03	193.9	12.1	28.1	120.4	33.3	60.6	115.00	106.8	128.6
Jan-04	194.5	12.7	27.3	120.6	33.8	60.1	113.80	104.1	128.9
Feb-04	191.2	12.7	27.0	117.9	33.5	59.1	113.00	102.6	129.1
Mar-04	193.6	12.7	27.3	118.6	34.9	61.0	113.10	102.4	129.3
Apr-04	192.6	12.7	27.4	117.9	34.6	61.9	114.70	101.9	129.7
Month-over-month growth rates									
Apr-03	0.6	-2.4	1.6	0.1	2.5	0.3	-1.1	-1.3	-0.1
May-03	-0.5	0.9	0.2	-0.8	-0.6	0.8	0.5	-2.3	0.1
Jun-03	0.5	4.6	-1.4	-0.3	3.3	-0.6	-2.1	-1.4	0.2
Jul-03	-0.3	-4.6	0.3	1.1	-3.9	0.3	0.6	-1.2	0.3
Aug-03	0.1	-1.6	2.4	-0.3	0.0	2.2	0.2	-0.2	0.3
Sep-03	-1.7	1.4	-1.2	-2.0	-2.0	-1.4	0.9	-1.9	0.0
Oct-03	-0.4	-0.7	-2.1	0.8	-3.2	2.0	0.5	2.0	0.1
Nov-03	1.7	-0.4	-0.2	1.7	4.3	0.8	-0.5	-0.7	0.4
Dec-03	0.7	-3.4	-1.4	1.9	0.1	0.1	0.6	-1.3	-0.1
Jan-04	0.3	4.4	-2.7	0.2	1.7	-0.5	-1.0	-2.5	0.2
Feb-04	-1.7	0.1	-1.1	-2.2	-0.9	-1.0	-0.7	-1.4	0.2
Mar-04	1.2	0.3	1.1	0.6	4.1	1.9	0.1	-0.2	0.2
Apr-04	-0.5	-0.5	0.3	-0.6	-0.8	0.9	1.4	-0.5	0.3

[1]Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

[2]Source: Pannell Kerr Forster and BC Stats

[3]Occupancy Rate change expressed as percentage point change

[4] No identifiable seasonality

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns [1]					
	Receipts ($ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
Annual data						
1996	4,054.6	284.7	3,769.9	23,436.2	1,368.9	22,067.3
1997	4,335.2	339.9	3,995.3	24,974.5	1,576.4	23,398.1
1998	4,641.0	398.8	4,242.2	26,993.2	1,805.3	25,187.9
1999	4,467.5	369.8	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
2003	5,388.8	284.4	5,104.3	33,648.9	2,089.1	31,559.8
Annual growth rates						
1999	-3.7	-7.3	-3.4	4.3	12.9	3.6
2000	8.1	-2.9	9.1	7.5	8.4	7.4
2001	7.1	-0.3	7.7	6.6	3.2	6.8
2002	-1.5	-14.6	-0.5	2.8	-1.7	3.1
2003	5.6	-7.0	6.4	1.6	-6.8	2.2
Monthly data						
Apr-03	427	24	403	2,706	178	2,528
May-03	430	24	406	2,767	173	2,595
Jun-03	430	24	406	2,772	175	2,597
Jul-03	451	24	427	2,789	181	2,607
Aug-03	460	24	436	2,817	174	2,643
Sep-03	464	23	441	2,825	168	2,657
Oct-03	470	22	448	2,865	168	2,696
Nov-03	477	23	454	2,898	169	2,729
Dec-03	478	24	454	2,887	167	2,720
Jan-04	479	22	456	2,868	158	2,710
Feb-04	485	23	463	2,935	166	2,768
Mar-04	498	23	475	2,962	169	2,792
Apr-04	518	24	494	3,014	167	2,846
Month-over-month growth rates						
Apr-03	-0.5	3.8	-0.8	-2.6	0.6	-2.8
May-03	0.6	-3.0	0.8	2.3	-3.1	2.6
Jun-03	0.1	1.4	0.0	0.2	1.3	0.1
Jul-03	5.0	1.3	5.2	0.6	3.5	0.4
Aug-03	2.0	-1.1	2.2	1.0	-3.9	1.4
Sep-03	0.7	-6.1	1.1	0.3	-3.6	0.5
Oct-03	1.4	-1.8	1.5	1.4	0.3	1.5
Nov-03	1.5	2.3	1.4	1.2	0.5	1.2
Dec-03	0.2	4.7	-0.1	-0.4	-1.4	-0.3
Jan-04	0.2	-5.5	0.5	-0.7	-5.4	-0.4
Feb-04	1.4	1.2	1.4	2.3	5.3	2.2
Mar-04	2.5	1.3	2.6	0.9	1.9	0.9
Apr-04	4.1	5.9	4.0	1.7	-1.3	1.9

[1]Source: Statistics Canada & BC Stats

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below $20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Visit BC STATS on the World Wide Web at www.bcstats.gov.bc.ca

BRITISH COLUMBIA

BC STATS

Ministry of
Management Services

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Tourism Sector Monitor ◆ August 2004

Room Revenue

Room revenues in British Columbia slipped in May (-1.0%, *seasonally adjusted*) after expanding 3.6% in April. Room revenues have been weak throughout 2004, increasing only once since last December.

Thompson-Okanagan (+1.6%, *seasonally adjusted*) was the only region where room revenues were up in May. This reflected the solid performance of hotels and motels in the region. Five of the eight development regions in BC saw room revenues decline, with particularly large downturns recorded in Northeast (-18.9%) and Nechako (-7.9%).

Room revenues slipped in May

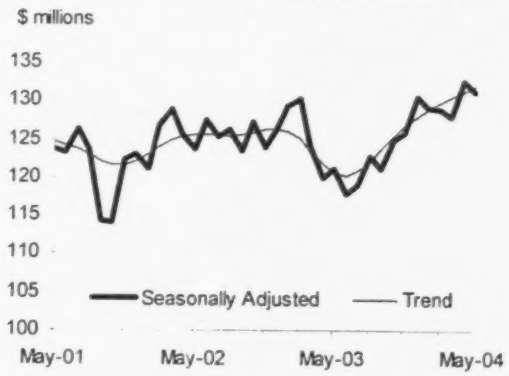


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type	May.04 ($000)	Apr.04 ($000)	% change
Total	131,210	132,596	-1.0
Hotels	98,188	97,087	+1.1
Motels	15,605	15,632	-0.2
Other Acc.	18,051	18,555	-2.7
Regions (Top 3 performers)			
Thompson-Okanagan	18,923	18,622	+1.6
Cariboo	3,640	3,638	+0.0
Mainland Southwest	72,888	72,876	+0.0

While revenues in the largest region, Mainland-Southwest, were virtually unchanged (+0.0%) in May, the slowdown was localized in the Greater Vancouver area. Richmond was the only centre in the Greater Vancouver area to see an upturn in revenues. Whistler picked up speed in May.

Province-wide, revenues were up at hotels (+1.1%), especially at the larger establishments. Hotels with 151-250 rooms posted the greatest gain (+3.2%, *seasonally adjusted*) in May. Overall, smaller hotels (1-75 rooms, -0.3%) and motels (-0.2%) inched down marginally. Other accommodation types (including bed and breakfasts, work camps and other types of short-term accommodation) plunged 8.4% after a significant rebound (+15.8%) in April.

Visitor Entries

The number of visitors entering Canada via BC border crossings edged up in May (+0.5%, *seasonally adjusted*), despite a drop in entries from the US (-1%). Japan (+37%), Taiwan (+20%) and the UK (+17%) led the growth in overseas visitors (+7%).

Visitor entries creep up

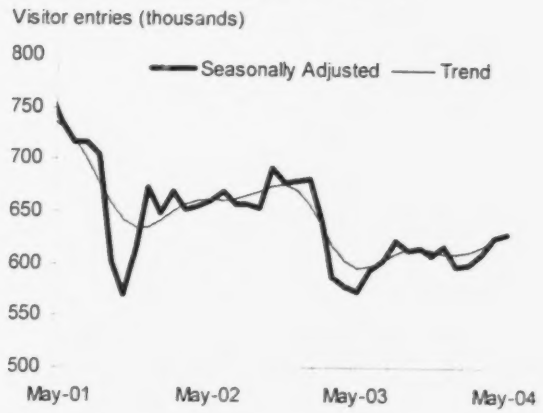


Table 2. Traveller Entries
(seasonally adjusted)

	May-04 ('000)	Apr-04 ('000)	% chg from Apr-04
American visitors			
Total	505	510	-1.0
Same-day	204	210	-2.9
Overnight	301	302	-0.3
Overseas visitors			
Total	127	118	7.0
Europe	37	35	6.6
UK	19	16	16.7
Asia	65	62	4.3
Japan	24	17	36.7
Taiwan	11	9	20.0
Oceania	13	12	13.3

(BC STATS & Statistics Canada)

note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

In the hotel industry, the occupancy rate edged down 0.2 percentage points (*seasonally adjusted*) in May. Room prices (-0.2%) were virtually unchanged from April. Employment in the key tourism-related industries inched up 0.2% (*seasonally adjusted*), led by an increase in the accommodation industry (+2.8%).

Passenger traffic at the Vancouver Airport was consistent with visitor entries in May. The total number of passengers increased 1.2%. There were more overseas passengers (+4.9%) but fewer people travelling to or from the US (-2.4%).

The number of vehicles (-2.1%) and passengers (-2.8%) aboard BC Ferries shrank in May (*seasonally adjusted*). In addition, there were 1.6% fewer passengers at the Victoria airport. Both the decline in the number of travellers and the loss in room revenues in Vancouver Island/Coast (-1.2%, *seasonally adjusted)* indicate a weak month for accommodation properties in Victoria.

The Canadian dollar continued to depreciate, falling marginally (to 0.73 US$) in May. The downward trend of the exchange rate could help boost the BC tourism sector by bringing more US visitors to the province.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	May-04	Change from Apr-04
Hotel Industry		
Occupancy rate	61.9	-0.2 pp.
Average room charge	115.80	-0.2%
(Pannell Kerr Forster)		
Airport Passengers	**(000s)**	**(%)**
Vancouver International Airport		
Total traffic	1,320	1.2
US	332	-2.4
Other International	329	4.9
Canada	659	1.3
(YVR)		
Victoria International Airport		
Total traffic	103	-1.6
(Victoria Airport Authority)		
Transportation	**(000s)**	**(%)**
Coquihalla Highway		
Passenger Vehicles	215	-2.9
(Ministry of Transportation & Highways)		
BC Ferries		
Vehicle Volume	700	-2.1
Passenger Volume	1,817	-2.8
(BC Ferries)		
Exchange Rates	**Cdn $**	
US $	0.726	-0.02
UK Pound	0.406	-0.01
Japanese Yen	81.268	1.04
Australian $	1.029	0.03
(Statistics Canada)		

note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are now reported on a **seasonally adjusted** basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues edged up 0.5% (*seasonally adjusted*) in June. All regions fared relatively well, except for Thompson-Okanagan (-1.9%), the only region to escape the downturn in May. The improvement in June was largely due to stronger revenues at hotels (+0.2%) and motels (+1.0%), especially larger hotels with 151-250 rooms (+2.2%).

The number of passenger vehicles on the Coquihalla Highway declined 1.3% in June. Mixed signals were shown on BC Ferries, since there were fewer passengers (-0.4%) but more vehicles (+0.4%) aboard in June.

On the other hand, visitor entries continued to rise in June (+1.5%). Overseas visitors entries were still going strong (+1.5%), posting their twelfth monthly increase since June 2003. Entries from the US were up 1.5%, with a drop in the number of overnight visitors (-0.6%) partly offsetting an increase in those making same-day cross-border excursions (+3.9%).

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers – reported in the "look ahead" section – were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

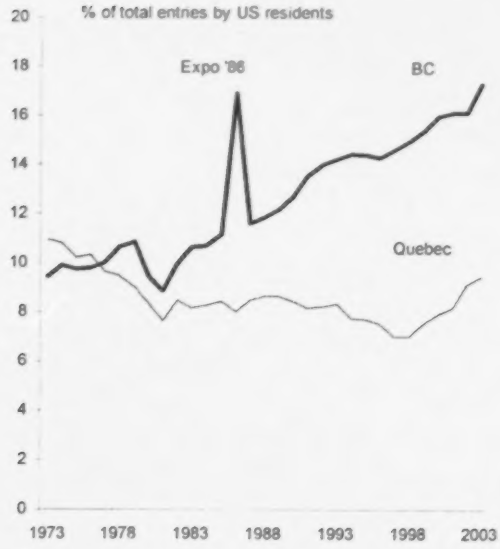
Special Focus:
Travel from the US to Canada: three years later, is 9/11 still having an effect?

BC–a prime destination for Americans

Americans are a significant driving force in BC's tourism economy. In 2003, US residents made more than 35 million trips to Canada. Over 6 million of those visits began in British Columbia.

BC is the second most common point of entry for US residents, after Ontario. The province has held this position since 1977, when it first overtook Quebec, and the percentage of US visitors entering Canada via British Columbia has been growing steadily during most of the period since then. Last year, 17% of all US entries to Canada were through British Columbia, a proportion not seen since 1986, when Vancouver hosted an international exposition.

Seventeen percent of American visits to Canada started out in BC last year



Source: Statistics Canada

By comparison, Quebec was the first point of entry for 9% of American visitors to Canada in 2003. Ontario's share was 62%, down from a peak level of 71% reached in 1981.

Number of US residents entering Canada ('000)

	2000	2001	2002	2003
Canada	43,994	42,871	40,835	35,495
BC	7,006	6,895	6,583	6,125
Alberta	732	732	733	696
Ontario	29,119	28,099	26,198	21,954
Quebec	3,479	3,506	3,712	3,350
Rest of Canada	3,658	3,639	3,610	3,370

Source: Statistics Canada

About 2% of visitors from the US enter Canada via Alberta, with the remaining 9% coming to other provinces. BC is the only region that has experienced a substantial increase in market share during the last 30 years.

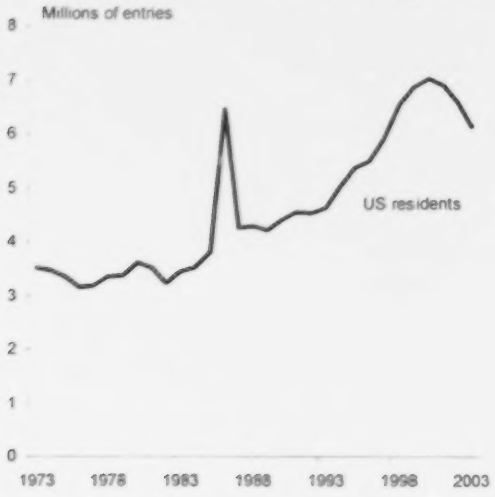
It should be noted that visitor entry statistics don't give a complete picture of tourist activities, since they only indicate where the first point of entry into the country is. Travellers going to other parts of Canada may enter via BC, but have an ultimate destination that is in some other province. However, it is likely that a significant part of the substantial increase in entries over the last thirty years represents tourists who are visiting the province. Even those who are simply travelling through British Columbia provide a boost to the economy by purchasing goods and services from local merchants.

Post 9/11 decline

The events of September 11, 2001 had an immediate and lasting impact on visits from the US, bringing an abrupt end to what had been a steady increase in travel to the province. Entries from the US have continued to decline since then. The chance of a turnaround was hampered by factors such as the war in Iraq, and the SARS outbreak in the spring of 2003, which had a dampening

effect on travel by Americans to the province.

Travel from the US to BC fell sharply after 9/11



Source: Statistics Canada

However, BC appears to have been less affected than other parts of the country were. Even though the number of entries from the US has decreased since 9/11, British Columbia's share of total US visitor entries has been growing substantially. This suggests that British Columbia continues to be an attractive destination for Americans.

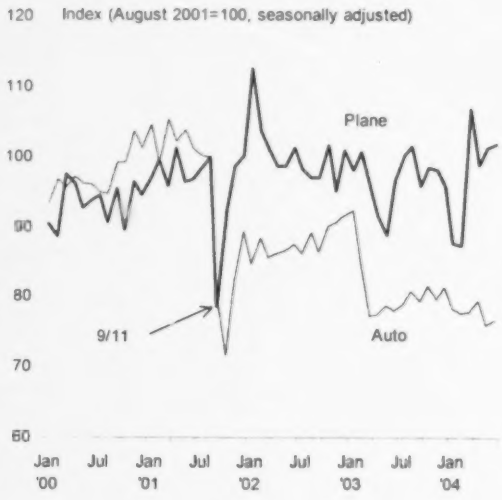
Travel by air has bounced back since 9/11; auto traffic remains stalled

By far the most common mode of travel for Americans coming to Canada is by car: some 68% of total entries by US residents to BC in 2003 were individuals in private vehicles. Another 17% flew into BC, while 9% travelled by boat. Nationally, travel by car is even more common, accounting for 81% of all US entries into Canada in 2003. Airplane passengers made up 11% of the national total, with the remainder travelling by bus, train, boat, or some other means.

Monthly data on US visitor entries to BC (*seasonally adjusted*) suggest that the post-9/11 slowdown in travel by plane was not long-lived. By December of 2001, the number of Americans flying into BC was back up to a more normal level.

Turbulence in the airline industry, and the impact of external events such as SARS and the war in Iraq have contributed to some ups and downs in passenger volumes from the US during the period since then, but it is clear that entries by plane are now back on course. In 2003, 17% of all US visitors flew to BC, up from 15% in 2001, and 14% in the previous year. The increase in the relative importance of US air travel to BC may be partly due to Vancouver's role as a hub city for airline travel, but also reflects a shift in the behaviour of US residents, as fewer of them are opting to drive when they travel to this province.

US entries by plane back on course; travel by auto still down



Source: Statistics Canada

The long-term effect of the 9/11 attacks appears to have been greatest for those travelling by car. The number of US entries by auto remains significantly lower than it was in the summer of 2001. About 370,000 US vehicle passengers crossed the BC border in June 2004, 26% less than in June 2001, when more than 500,000 US auto passen-

gers entered Canada via BC. Entries by auto picked up in 2002, but plunged again in March 2003, when the war in Iraq began.

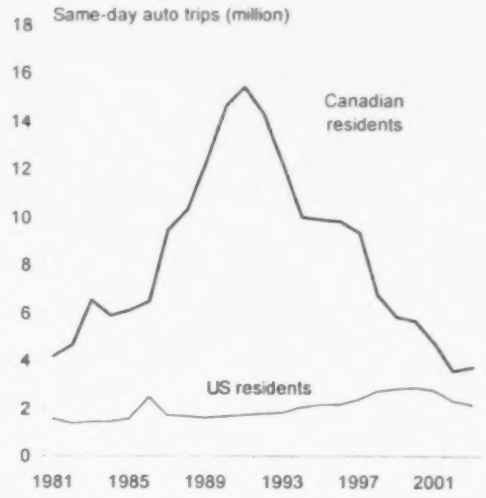
Longer waits at BC–US border crossings

There are eighteen border crossings connecting British Columbia and the US. Border crossings in the Lower Mainland Area–Peace Arch Pacific Highway, Lynden/ Aldergrove, Sumas/Huntingdon are among the busiest. Most vehicle passengers–Canadians, Americans and foreign tourists–travelling to or from the US enter or leave BC via one of these four crossings.

Statistics from the IMTC Cross-Border Trade and Travel Study[1], show that traffic volumes have dropped significantly at all four of these crossings. However, the downturn began well before the events of 9/11. In 1993, a total of 14.1 million vehicles travelled (northbound and southbound) through these checkpoints; last year, the number totalled 7.0 million, 1.2 million less than in 2000.

The downturn in vehicle traffic through these border crossings is coincident with a decline in same-day travel to the US. During the 1980s, a relatively strong Canadian dollar made it cost-effective for Canadians to travel to the US to shop, and many residents of the Lower Mainland area (and other centres close to the US) made frequent trips across the border. Between 1981 and 1991, the number of same-day car trips from BC to the US increased from 4 million to 15 million. The depreciation of the Canadian dollar during the 1990s effectively halted much of this activity. By the year 2000, the number had dropped to just under 6 million, and last year, fewer than 4 million same-day trips were made to the US.

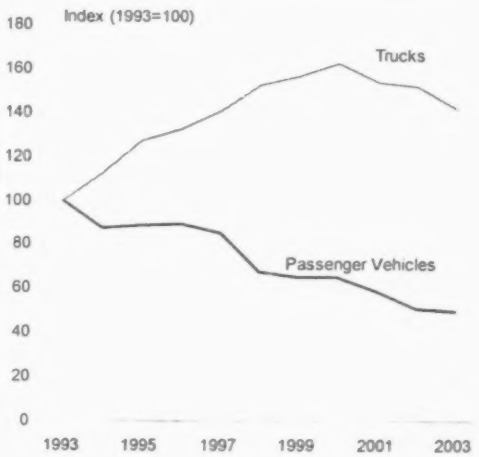
Fewer same day car trips by Canadians and Americans



Source: Statistics Canada

In contrast to passenger travel, between 1993 and 2003, the number of trucks crossing the border through the four ports in the Lower Mainland region has been increasing, rising from 387,000 in 1993 to 542,000 last year. As was the case for passenger vehicles, commercial traffic through these border crossings has declined substantially since 9/11.

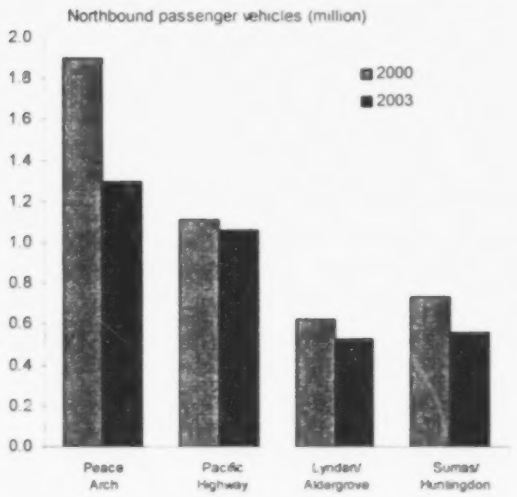
Fewer commercial and passenger vehicles crossing the border near Vancouver



Source: IMTC Cross-Border Trade and Travel Study

[1] The International Mobility and Trade Corridor Project (www.wcog.org)

Fewer vehicles at all four border crossings in the Lower Mainland area



Source: IMTC Cross-Border Trade and Travel Study

While all border crossings are processing fewer vehicles, the Peace Arch crossing has seen the biggest decline in traffic. This crossing, connecting Surrey, BC and Blaine, Washington, is the busiest in BC and one of the five busiest in Canada. Traffic volume through the Peace Arch crossing in 2003 (1.3 million) was only about two thirds of that in 2000 (1.9 million).

Top 5 Border Crossings for Personal Vehicles travelling to the US ('000)

	2002	2003
Buffalo-Niagara Falls, NY	7,570	6,414
Detroit, MI	6,857	6,316
Blaine, WA [2]	2,385	2,300
Port Huron, MI	2,187	1,965
Massena, NY	1,163	1,134
Total Canada–US Crossings	32,539	30,214

Source: US Department of Transportation

Canada–US Smart Border Declaration

The post 9/11 downturn in cross-border travel by car is almost certainly related to the greater difficulty of crossing the border, as increasingly strict security measures have been implemented in order to reduce the possibility of future terrorist attacks. This tightening of the border has led to longer transit times, and more importantly, an increase in uncertainty about the time that border crossings will take. Among other things, long lineups at border crossings make same-day trips less practical for both Americans and Canadians.

The Canada-US Smart Border Declaration is intended to ensure the secure flow of people, the secure flow of goods, secure infrastructure, and coordination and information sharing[3]. Although this makes the public safer, it also means that it has become a great deal less convenient to travel between Canada and the US by car. This has helped keep the lid on travel from the US to BC during the post-9/11 period.

[2] Total of Peace Arch and Pacific Highway Crossings

[3] Department of Foreign Affairs and International Trade (http://www.dfait-maeci.gc.ca/can-am/menu-en.asp?act=v&mid=1&cat=1&did=1669)

Table 1: Room Revenue by Development Region ($000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
May-03	22,294	65,887	17,283	5,899	3,579	1,536	749	3,882	121,109
Jun-03	21,904	63,010	17,613	5,865	3,632	1,564	714	3,495	117,797
Jul-03	21,949	64,417	17,177	5,928	3,533	1,579	724	3,833	119,138
Aug-03	22,585	67,330	17,272	5,732	3,542	1,633	726	4,020	122,840
Sep-03	22,487	66,852	16,682	5,750	3,485	1,604	729	3,581	121,169
Oct-03	23,395	67,394	17,861	6,198	3,776	1,601	757	3,823	124,805
Nov-03	23,517	68,492	18,061	6,013	3,671	1,630	715	3,799	125,898
Dec-03	23,866	69,862	19,786	6,507	3,759	1,757	729	4,214	130,481
Jan-04	25,384	68,603	18,778	6,434	3,583	1,681	715	3,941	129,119
Feb-04	23,883	69,296	18,688	6,692	3,679	1,648	720	4,300	128,906
Mar-04	23,612	68,886	18,914	6,197	3,831	1,586	618	4,351	127,994
Apr-04	23,724	72,876	18,622	6,484	3,638	1,657	791	4,804	132,596
May-04	23,428	72,888	18,923	6,095	3,640	1,609	729	3,897	131,210
Month-over-month growth rates									
May-03	-1.9	2.5	-1.9	3.7	-0.6	-3.6	3.3	5.5	1.0
Jun-03	-1.8	-4.4	1.9	-0.6	1.5	1.8	-4.6	-10.0	-2.7
Jul-03	0.2	2.2	-2.5	1.1	-2.7	0.9	1.4	9.7	1.1
Aug-03	2.9	4.5	0.6	-3.3	0.3	3.4	0.4	4.9	3.1
Sep-03	-0.4	-0.7	-3.4	0.3	-1.6	-1.8	0.3	-10.9	-1.4
Oct-03	4.0	0.8	7.1	7.8	8.3	-0.2	4.0	6.8	3.0
Nov-03	0.5	1.6	1.1	-3.0	-2.8	1.8	-5.6	-0.6	0.9
Dec-03	1.5	2.0	9.6	8.2	2.4	7.8	1.9	10.9	3.6
Jan-04	6.4	-1.8	-5.1	-1.1	-4.7	-4.4	-1.8	-6.5	-1.0
Feb-04	-5.9	1.0	-0.5	4.0	2.7	-2.0	0.7	9.1	-0.2
Mar-04	-1.1	-0.6	1.2	-7.4	4.2	-3.8	-14.2	1.2	-0.7
Apr-04	0.5	5.8	-1.5	4.6	-5.0	4.5	28.0	10.4	3.6
May-04	-1.2	0.0	1.6	-6.0	0.0	-2.9	-7.9	-18.9	-1.0

May month-over-month percent growth

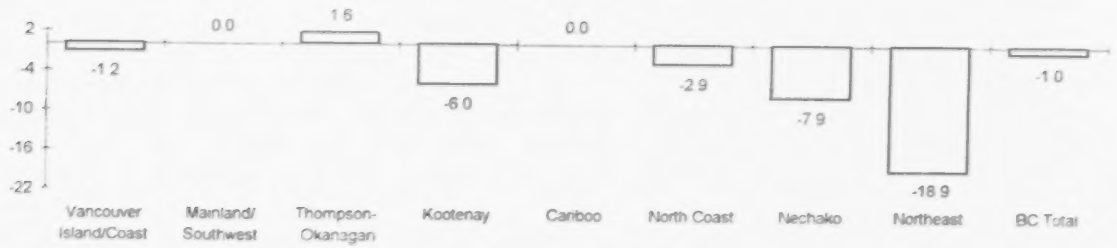


Table 2: Room Revenue by Accommodation Type ($000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			
Annual data							
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
Annual growth rates							
1999	5.4	15.3	15.3	12.9	2.2	19.2	12.0
2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
Monthly data							
May-03	35,082	14,452	23,924	14,386	14,734	9,910	7,743
Jun-03	33,453	14,120	24,121	14,310	14,948	9,842	7,608
Jul-03	33,895	14,357	24,106	14,250	14,593	9,899	7,647
Aug-03	36,843	14,945	24,801	14,553	14,666	9,894	7,614
Sep-03	35,565	14,905	24,652	14,198	13,927	9,505	7,843
Oct-03	36,401	15,445	25,455	14,769	15,747	9,812	7,959
Nov-03	36,392	15,660	25,717	14,639	15,348	10,133	7,668
Dec-03	38,517	15,997	25,456	14,858	16,838	10,491	8,815
Jan-04	37,073	15,813	25,795	15,032	15,778	9,758	8,261
Feb-04	37,447	15,507	25,927	14,733	15,728	9,946	8,084
Mar-04	38,158	16,106	26,039	14,787	15,810	9,423	7,434
Apr-04	39,678	15,600	26,615	15,194	15,632	9,946	8,609
May-04	40,221	16,103	26,719	15,145	15,605	10,168	7,883
Month-over-month growth rates							
May-03	0.1	-3.3	-1.6	0.7	-2.2	6.9	9.7
Jun-03	-4.6	-2.3	0.8	-0.5	1.4	-0.7	-1.7
Jul-03	1.3	1.7	-0.1	-0.4	-2.4	0.6	0.5
Aug-03	8.7	4.1	2.9	2.1	0.5	0.0	-0.4
Sep-03	-3.5	-0.3	-0.6	-2.4	-5.0	-3.9	3.0
Oct-03	2.3	3.6	3.3	4.0	13.1	3.2	1.5
Nov-03	0.0	1.4	1.0	-0.9	-2.5	3.3	-3.6
Dec-03	5.8	2.1	-1.0	1.5	9.7	3.5	15.0
Jan-04	-3.7	-1.1	1.3	1.2	-6.3	-7.0	-6.3
Feb-04	1.0	-1.9	0.5	-2.0	-0.3	1.9	-2.1
Mar-04	1.9	3.9	0.4	0.4	0.5	-5.3	-8.0
Apr-04	4.0	-3.1	2.2	2.8	-1.1	5.6	15.8
May-04	1.4	3.2	0.4	-0.3	-0.2	2.2	-8.4

May month-over-month percent growth

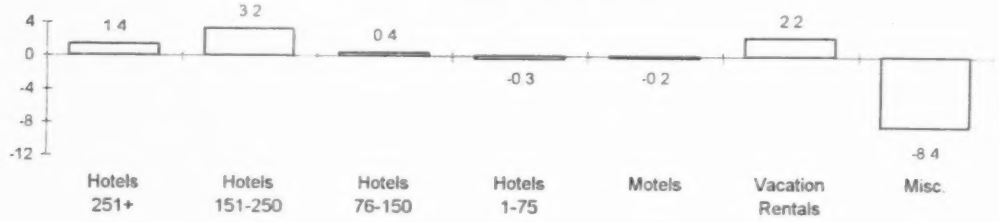


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) May-04	Revenue ($000) YTD 04	Revenue % change from May-03	Revenue % change from YTD 03	Properties (#) May-04	Properties # chg from May-03	Rooms (#) May-04	Rooms # chg from May-03
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	15,461	50,395	5.0	6.5	176	5	8,270	340
Total - Hotels	12,946	42,628	6.9	8.8	68	1	5,512	171
76+ Rooms	10,295	33,411	10.6	12.4	26	1	3,937	236
1-75 Rooms	2,651	9,217	-5.4	-2.6	42	0	1,575	-65
Motels	1,191	4,117	-2.1	-0.1	30	-1	1,095	7
Vacation Rentals	430	1,283	-18.7	-24.1	27	1	382	90
19 Cowichan Valley								
Total - All accommodation types	754	2,675	0.7	5.9	36	1	659	4
Motels	160	677	-3.9	14.9	16	0	304	0
21 Nanaimo								
Total - All accommodation types	2,956	11,716	-1.4	4.3	72	-1	2,554	-204
Total - Hotels	1,566	6,523	-3.7	7.7	20	0	1,266	-149
Motels	571	2,234	-7.0	1.0	22	-1	566	-52
Vacation Rentals	660	2,524	7.4	0.4	21	0	585	-3
23 Alberni-Clayoquot								
Total - All accommodation types	2,844	9,818	10.7	7.8	59	1	1,442	-8
Total - Hotels	829	2,788	12.1	16.1	12	2	455	9
Motels	286	894	21.9	3.0	20	-1	405	-10
Vacation Rentals	949	3,378	5.9	0.6	11	1	279	15
25 Comox-Strathcona								
Total - All accommodation types	2,531	9,435	-0.2	4.3	67	-4	1,776	-117
Fishing lodges	526	759	17.2	11.1	13	-1	284	-5
Motels	600	2,541	-2.5	6.2	23	-1	605	-49
Vacation Rentals	242	1,060	-2.0	1.5	17	-2	209	-12
27 Powell River								
Total - All accommodation types	-	-	-	-	19	2	374	6
43 Mount Waddington								
Total - All accommodation types	424	1,165	19.0	-9.5	21	1	677	105
Total - Hotels	244	718	16.4	-13.3	12	1	538	105
45 Central Coast								
Total - All accommodation types	-	-	-	-	9	-2	144	-11
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	3,103	13,540	5.3	6.4	67	2	2,550	70
Total - Hotels	2,292	9,957	3.9	5.9	23	1	1,495	53
Motels	696	2,406	10.6	10.5	37	1	925	15
15 Greater Vancouver								
Total - All accommodation types	61,806	215,844	11.3	12.2	242	-6	27,050	-198
Total - Hotels	58,540	205,598	11.8	12.9	158	-4	23,142	-177
251+ Rooms	33,342	114,672	12.1	14.1	25	0	9,956	0
151-250 Rooms	10,451	38,390	10.8	10.9	25	0	4,752	-1
76-150 Rooms	10,989	39,551	11.9	11.4	53	-1	5,753	-93
1-75 Rooms	3,758	12,985	12.3	13.5	55	-3	2,681	-83
Motels	1,428	5,410	-3.5	-2.4	37	-1	1,557	-74
Vacation Rentals	702	2,757	17.8	8.2	17	1	547	51
29 Sunshine Coast								
Total - All accommodation types	351	1,200	21.1	12.3	24	2	415	49
31 Squamish-Lillooet								
Total - All accommodation types	6,221	106,727	17.2	-12.3	93	3	6,744	-237
Total - Hotels	5,191	85,108	16.5	-10.9	45	1	5,407	4
76+ Rooms	4,783	77,858	18.9	-11.3	25	0	4,676	4
1-75 Rooms	408	7,251	-5.7	-6.7	20	1	731	0
Vacation Rentals	663	15,609	41.8	-15.9	24	1	880	-249
Miscellaneous	222	5,402	-7.1	-21.9	17	1	288	8
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	2,992	9,082	4.5	12.9	115	3	3,245	-37
Total - Hotels	1,684	5,490	4.7	9.6	16	0	1,159	-11
Motels	1,067	2,838	2.2	19.8	79	1	1,844	28
Vacation Rentals	178	557	26.9	18.8	12	0	157	-68

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) May-04	Revenue ($000) YTD 04	Revenue % change from May-03	Revenue % change from YTD 03	Properties (#) May-04	Properties # chg from May-03	Rooms (#) May-04	Rooms # chg from May-03
33 Thompson-Nicola								
Total - All accommodation types	5,531	22,965	14.3	12.1	154	-6	5,397	-80
Total - Hotels	2,779	10,311	7.7	14.5	34	0	2,189	-31
76+ Rooms	2,205	8,455	7.4	17.4	11	-1	1,312	-77
1-75 Rooms	574	1,855	8.8	2.7	23	1	877	46
Motels	1,941	5,561	15.6	10.8	74	-1	2,243	-8
Vacation Rentals	377	5,550	75.9	11.4	19	-1	468	-1
35 Central Okanagan								
Total - All accommodation types	5,912	22,873	9.8	6.5	63	4	3,477	60
Total - Hotels	4,299	15,349	10.3	7.2	19	0	1,710	-23
Motels	1,279	3,650	5.3	8.1	27	2	1,177	55
Vacation Rentals	166	3,510	28.7	-0.0	14	3	201	37
37 North Okanagan								
Total - All accommodation types	1,271	7,927	-1.7	-2.4	46	0	1,494	55
Motels	547	1,830	24.2	28.0	19	1	654	117
39 Columbia-Shuswap								
Total - All accommodation types	2,324	11,267	18.7	7.2	99	-3	3,223	-38
Total - Hotels	1,219	4,636	33.5	13.6	18	-1	1,220	-15
Motels	972	3,688	11.2	10.4	49	0	1,553	22
Miscellaneous	59	2,538	-38.5	-5.9	18	-1	297	-12
Kootenay								
01 East Kootenay								
Total - All accommodation types	2,753	23,164	1.7	7.9	105	-1	4,113	-149
Total - Hotels	904	7,324	3.5	2.2	22	-1	1,359	4
Motels	839	3,423	5.1	4.4	51	-2	1,212	-41
Vacation Rentals	307	6,568	-7.8	29.0	15	2	908	94
03 Central Kootenay								
Total - All accommodation types	1,588	6,037	4.5	5.6	80	3	1,630	50
Total - Hotels	883	3,362	3.5	7.0	18	3	769	75
Motels	428	1,337	4.4	-4.7	31	-1	555	-44
Vacation Rentals	114	311	13.8	20.0	20	0	157	0
05 Kootenay Boundary								
Total - All accommodation types	394	2,365	-13.3	2.0	33	-2	655	-9
Motels	242	1,046	-11.6	1.4	22	0	370	1
Cariboo								
41 Cariboo								
Total - All accommodation types	1,436	5,001	-0.9	4.2	99	-6	1,994	-40
Fishing lodges	41	77	-22.8	13.7	11	-4	77	-25
Total - Hotels	442	1,615	-5.0	6.8	11	1	524	15
Motels	791	2,840	4.5	4.6	34	-2	975	-76
Vacation Rentals	63	115	6.3	2.5	30	-1	286	47
Miscellaneous	99	353	-13.5	-10.0	13	0	132	-1
53 Fraser-Fort George								
Total - All accommodation types	2,395	9,985	2.7	3.2	57	2	2,705	24
Total - Hotels	1,684	7,229	0.9	3.3	19	0	1,407	0
Motels	626	2,285	5.0	4.1	29	1	986	20
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	880	2,668	3.5	6.3	38	0	1,093	28
Motels	180	662	0.9	12.8	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	624	2,756	5.5	-0.0	32	1	827	7
Motels	232	978	3.3	-12.1	16	0	414	0
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	652	2,579	-2.1	-6.4	51	-3	1,152	-99
Motels	395	1,497	-0.5	-7.7	25	-1	669	-16
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	2,392	24,184	-2.4	10.5	68	5	3,492	1,003
Total - Hotels	1,424	10,611	22.4	24.1	21	2	1,504	168
Motels	684	4,590	12.8	11.4	34	2	951	51

"." Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	($000)		% change from		(#)	# chg from	(#)	# chg from
	May-04	YTD 04	May-03	YTD 03	May-04	May-03	May-04	May-03
Vancouver Island/Coast	**25,574**	**87,359**	**4.5**	**6.6**	**459**	**3**	**15,896**	**115**
Victoria (C)	12,623	41,388	7.5	9.1	79	5	5,577	255
Other CRD	2,838	9,007	-5.0	-3.9	97	0	2,693	85
Nanaimo (C)	1,573	6,787	-8.0	4.4	21	-1	1,147	-59
Port Alberni (C)	258	1,040	11.6	3.4	13	1	352	-1
Courtenay (C)	-	-	-	-	9	0	418	0
Rest of Development Region	-	-	-	-	249	-2	5,709	-165
Mainland/Southwest	**71,481**	**337,311**	**11.5**	**2.9**	**426**	**1**	**36,759**	**-316**
Downtown Vancouver (C)	41,568	137,191	12.3	15.5	83	-2	12,785	-135
Other Vancouver (C)	2,994	10,184	5.3	4.7	40	-4	2,733	-76
Richmond (C)	8,334	34,775	16.4	9.8	23	0	4,321	59
Burnaby (C)	2,470	9,698	4.3	7.7	12	0	1,635	362
Other GVRD	6,441	23,995	4.3	3.9	84	0	5,576	-46
Whistler (DM)	5,762	104,216	17.7	-12.3	69	2	6,177	-260
Rest of Development Region	3,913	17,251	7.3	3.3	115	5	3,532	-220
Thompson/Okanagan	**18,029**	**74,113**	**10.4**	**8.0**	**477**	**-2**	**16,836**	**-40**
Penticton (C)	1,810	5,876	2.5	13.2	48	2	1,855	5
Kamloops (C)	4,331	19,048	13.6	12.8	64	-1	3,511	-23
Kelowna (C)	5,380	21,326	8.3	5.2	49	3	2,961	31
Vernon (C)	1,188	7,705	-0.2	-2.6	28	0	1,304	55
Revelstoke (C)	852	5,010	15.9	1.3	29	-2	1,245	-28
Rest of Development Region	4,468	15,146	15.6	12.8	259	-4	5,960	-80
Kootenay	**4,735**	**31,567**	**1.2**	**7.0**	**218**	**0**	**6,398**	**-108**
Cranbrook (C)	586	2,464	0.6	2.9	17	0	794	0
Nelson (C)	535	2,307	-9.1	7.1	11	-1	419	-8
Rest of Development Region	3,614	26,795	3.0	7.4	201	0	5,604	-108
Cariboo	**3,831**	**14,986**	**1.3**	**3.6**	**156**	**-4**	**4,699**	**-16**
Quesnel (C)	305	1,265	2.7	12.3	12	0	427	0
Williams Lake (C)	435	1,523	-4.2	-1.6	10	-1	502	-66
Prince George (C)	1,862	7,760	0.2	3.3	30	2	1,926	24
Rest of Development Region	1,229	4,439	5.0	3.6	104	-5	1,844	26
North Coast	**1,504**	**5,424**	**4.3**	**3.0**	**70**	**1**	**1,920**	**35**
Prince Rupert (C)	554	2,034	7.3	5.8	15	0	761	28
Terrace (C)	385	1,675	-2.3	2.9	12	0	418	0
Rest of Development Region	566	1,715	6.3	-0.0	43	1	741	7
Nechako	**652**	**2,579**	**-2.1**	**-6.4**	**51**	**-3**	**1,152**	**-98**
Smithers (T)	280	1,210	-3.3	-5.4	12	-1	399	-17
Rest of Development Region	373	1,370	-1.1	-7.2	39	-2	753	337
Northeast	**2,392**	**24,184**	**-2.4**	**10.5**	**68**	**5**	**3,492**	**1003**
Dawson Creek (C)	399	2,550	28.4	24.6	13	-1	484	-11
Fort St. John (C)	817	9,999	-4.5	15.7	20	1	1,542	93
Rest of Development Region	1,176	11,634	-8.5	4.0	35	5	1,466	921

"-" Data for regions with fewer than 10 properties reporting can not be released.

Table 5: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
May-03	24,464	64,094	16,335	4,681	3,780	1,441	666	2,452	117,914
Jun-03	28,787	69,739	21,407	5,635	4,485	2,608	928	2,885	136,475
Jul-03	39,350	86,148	32,863	8,643	5,169	3,103	1,058	3,762	180,097
Aug-03	47,004	101,199	37,026	9,969	5,569	3,107	1,142	3,978	208,993
Sep-03	31,458	72,552	20,022	6,662	4,774	2,338	1,091	3,536	142,433
Oct-03	19,909	52,270	13,801	4,244	3,775	1,207	963	3,455	99,623
Nov-03	12,753	41,418	8,039	2,484	2,622	903	538	2,967	71,724
Dec-03	11,763	59,336	11,652	5,024	2,199	831	454	3,803	95,060
Jan-04	10,890	59,530	12,523	5,875	2,259	791	415	4,428	96,711
Feb-04	14,122	68,452	15,086	8,185	2,450	1,033	459	6,323	116,110
Mar-04	17,286	74,357	15,792	7,768	3,224	1,040	507	6,560	126,534
Apr-04	19,486	63,491	12,684	5,004	3,223	1,056	545	4,480	109,969
May-04	25,574	71,481	18,029	4,735	3,831	1,504	652	2,392	128,199
Year-over-year percent changes									
May-03	-1.1	-4.1	6.3	-2.7	-4.0	-6.1	9.4	28.6	-1.5
Jun-03	-3.3	-15.3	6.0	-3.1	-0.8	0.3	-0.6	16.8	-8.2
Jul-03	-0.6	-10.2	1.7	3.0	-0.5	0.3	0.4	38.1	-4.3
Aug-03	2.5	-3.6	-1.0	-8.9	-6.7	2.7	3.3	31.1	-1.6
Sep-03	2.5	-3.8	-4.5	-7.5	-7.4	-0.6	-1.1	4.5	-2.6
Oct-03	7.0	-5.8	3.1	7.1	1.4	5.2	-6.5	8.4	-0.9
Nov-03	7.1	-0.9	7.6	0.0	-0.5	4.4	-8.1	18.7	2.1
Dec-03	4.6	0.0	12.7	13.6	6.6	27.1	3.0	70.9	4.8
Jan-04	13.9	-4.4	3.3	8.0	0.4	8.0	-6.0	10.5	-0.1
Feb-04	9.7	-5.5	11.6	12.1	8.4	6.9	-14.0	24.7	1.0
Mar-04	3.8	1.4	7.0	0.3	7.8	-7.2	-15.9	-4.3	2.0
Apr-04	5.8	14.1	6.6	15.2	1.0	5.0	7.0	28.2	11.6
May-04	4.5	11.5	10.4	1.2	1.3	4.3	-2.1	-2.4	8.7

May year-over-year percent change

Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**
Annual data								
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,960.1	6,583.2	2,808.1	3,787.8	1,376.9	764.0	411.8	118.0
2003	7,327.5	6,125.2	2,584.0	3,553.4	1,202.3	577.6	410.1	124.8
Annual percent changes								
1999	5.4	4.8	7.9	2.0	8.6	9.7	7.8	6.6
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.2	-4.5	-13.8	4.2	-2.9	4.4	-11.7	-10.5
2003	-7.9	-7.0	-8.0	-6.2	-12.7	-24.4	-0.4	5.8
Monthly data								
Jun-03	596.2	503.6	209.6	292.0	92.6	37.7	32.1	10.8
Jul-03	607.5	511.7	210.5	296.9	95.9	42.4	33.2	10.2
Aug-03	624.0	522.0	215.2	303.2	102.0	49.3	33.7	10.6
Sep-03	618.1	515.2	215.2	294.7	102.9	50.7	33.5	10.8
Oct-03	614.4	509.1	219.0	294.7	105.3	58.0	33.7	9.8
Nov-03	608.0	502.4	212.6	290.3	105.6	55.3	34.3	10.4
Dec-03	611.9	504.7	211.5	292.4	107.2	55.5	34.3	10.9
Jan-04	594.9	487.0	204.3	284.2	107.9	55.8	34.1	11.5
Feb-04	599.5	488.4	206.1	285.6	111.1	55.6	34.9	11.2
Mar-04	613.5	505.3	210.2	299.2	108.3	57.3	34.7	9.5
Apr-04	628.2	510.0	210.3	301.9	118.2	61.9	34.9	11.8
May-04	631.4	504.9	204.3	300.8	126.5	64.6	37.2	13.4
Jun-04	640.8	512.4	212.3	298.9	128.4	69.3	37.3	12.4
Month-over-month growth rates								
Jun-03	3.3	2.3	-0.7	3.0	9.4	33.3	-1.2	3.3
Jul-03	1.9	1.6	0.4	1.7	3.5	12.5	3.2	-5.5
Aug-03	2.7	2.0	2.2	2.1	6.5	16.3	1.7	3.2
Sep-03	-0.9	-1.3	0.0	-2.8	0.9	2.8	-0.6	2.1
Oct-03	-0.6	-1.2	1.7	0.0	2.3	14.3	0.6	-8.8
Nov-03	-1.0	-1.3	-2.9	-1.5	0.3	-4.6	1.6	6.1
Dec-03	0.6	0.4	-0.5	0.7	1.6	0.4	0.0	4.6
Jan-04	-2.8	-3.5	-3.4	-2.8	0.6	0.5	-0.5	5.6
Feb-04	0.8	0.3	0.9	0.5	3.0	-0.4	2.1	-2.2
Mar-04	2.3	3.5	2.0	4.8	-2.6	3.2	-0.4	-15.6
Apr-04	2.4	0.9	0.0	0.9	9.2	8.0	0.6	24.6
May-04	0.5	-1.0	-2.9	-0.3	7.0	4.3	6.6	13.3
Jun-04	1.5	1.5	3.9	-0.6	1.5	7.3	0.2	-7.2

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below $20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Visit BC STATS on the World Wide Web at www.bcstats.gov.bc.ca

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October 15, 2004
Issue: 04-09

Tourism Sector Monitor ◆ September 2004

Room Revenue

Room revenues increased in June (+0.8%, *seasonally adjusted*), for only the second time since the beginning of the year. Revenues were up in almost all regions with the exception of Thompson-Okanagan (-1.9%). This is a reversal from May, when the region was the only area experiencing significant growth in room revenues.

Room revenues edged up in June

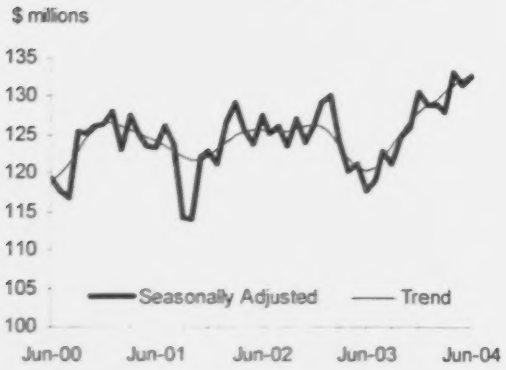


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type	June04 ($000)	May04 ($000)	% change
Total	132,566	131,533	+0.8
Hotels	98,990	98,507	+0.5
Motels	15,804	15,615	+1.2
Other Acc.	18,167	18,143	+0.1
Regions (Top 3 performers)			
Cariboo	3,777	3,658	+3.3
North Coast	1,664	1,614	+3.1
Vancouver Island/Coast	23,977	23,506	+2.0

Cariboo (+3.3%) and North Coast (+3.1%) posted strong growth in June. Northeast (+0.7%) and Nechako (+1.0 %), two of the regions affected negatively in May, were able to climb back to positive numbers from the sharp downturn recorded previously. Vancouver Island/Coast (+2.0%) also experienced a significant upturn from the levels (-1.0%) posted in May.

The greatest gain (+2.3%) was recorded by hotels with 151-250 rooms, followed by hotels with 1-75 rooms (+1.2%) and motels (+1.2%). Vacation rentals and very large hotels (with 251+ rooms) reported similar declines (-0.3%) Revenues at other accommodation types saw a modest recovery (+0.8%) after a sharp downturn (-7.9%) in May.

Visitor Entries

The volume of travellers entering Canada via BC continued to creep up in June (+1.5%). The recovery experienced in entries from the US (+1.5%) was due to strong growth among same-day visitors (+4.2%) following a sharp downturn (-3.0%) recorded in May. Overseas entries slowed down substantially (+1.5%) reflecting weak growth in the number of visitors coming from Europe (+0.6%) and a drop in entries from Australia and the South Pacific (-1.4%). Entries from Asia (+6.4%) were up, mainly due to a continuous interest from Japan (+24.0%) and Taiwan (+6.0%). Numbers from South Korea (+1.6%), the third biggest visitor market from Asia, bounced back after slumping in May (-3.1%).

Visitor entries continue to creep up

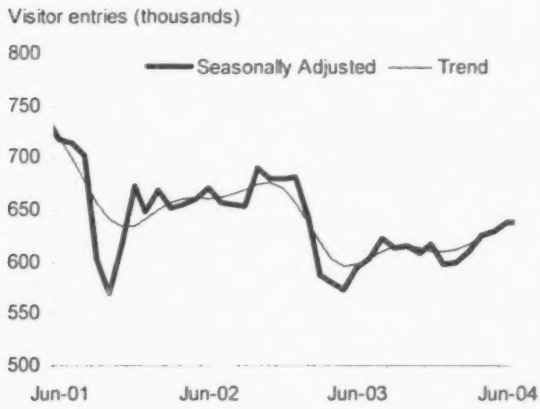


Table 2. Traveller Entries
(seasonally adjusted)

	Jun-04 ('000)	May-04 ('000)	% chg from May-04
American visitors			
Total	512	505	1.5
Same-day	212	204	4.2
Overnight	299	301	-0.7
Overseas visitors			
Total	128	127	1.5
Europe	38	38	0.6
UK	19	19	2.9
Asia	68	64	6.4
Japan	27	22	23.9
Taiwan	11	11	6.0
Oceania	13	13	-1.4

(BC STATS & Statistics Canada)

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

In the hotel industry, room rates (-0.2%, *seasonally adjusted*) were virtually unchanged for the second month in a row, while occupancy increased (+ 0.7 percentage point) to 62.5% in June.

Overall, employment in the tourism related industries (+0.1%) and air transport (+3.0%) experienced some gains in June. Transportation indicators were relatively weak in June with the exception of Victoria airport where passenger traffic increased (+0.6%), following a downturn in May (-1.6%). There was a slight jump in the number of vehicles (+0.1%) aboard BC Ferries.

For the first half of 2004, the Canadian dollar has been drifting downward, being quite volatile this year with frequent changes. In June the Canadian dollar edged up to US$ 0.74 but depreciated relative to the Japanese Yen. The change of the Canadian dollar versus the US dollar is relatively small compared to May and that is good news for BC's tourism industry.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Jun-04	Change from May-04
Hotel Industry		
Occupancy rate	62.5	0.7 pp.
Average room charge	115.50	-0.2%
(Pannell Kerr Forster)		
Airport Passengers	**(000s)**	**(%)**
Vancouver International Airport		
Total traffic	1,297	0.0
US	316	-2.9
Other International	321	0.1
Canada	660	1.4
(YVR)		
Victoria International Airport		
Total traffic	104	0.6
(Victoria Airport Authority)		
Transportation	**(000s)**	**(%)**
Coquihalla Highway		
Passenger Vehicles	214	-0.7
(Ministry of Transportation & Highways)		
BC Ferries		
Vehicle Volume	702	0.1
Passenger Volume	1,809	-0.5
(BC Ferries)		
Exchange Rates	**Cdn $**	
US $	0.737	0.01
UK Pound	0.403	0.00
Japanese Yen	80.587	-0.68
Australian $	1.062	0.03
(Statistics Canada)		

Note: pp. percentage

Note to readers: all data in the *Tourism Sector Monitor* are now reported on a **seasonally adjusted** basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues edged up (+0.2%, *seasonally adjusted*) in July. Slower growth was experienced in almost every region except Thompson-Okanagan (+1.9%) and Kootenay (+3.5%). The downturn was partly due to loss of revenues for very large (251+ rooms, -5.2%) and large (151-250 rooms, -1.1%) hotels. Revenues at other accommodation types (including fishing lodges, bed and breakfast and other similar establishments) experienced a significant increase (+4.8%) in July.

Passenger traffic at the Vancouver airport recorded a sharp downturn (-10.5%), while Victoria airport posted modest gains (+0.8%). The number of passenger vehicles on the Coquihalla Highway rose (+2.1%), bouncing back after three months of decline.

Visitor entries dropped (-0.9%, *seasonally adjusted)* in July for the first time since January. Both overseas (-3.6%) and US (-0.2%) entries declined in July. Although the number of overseas visitors from Europe soared (+7.3%), it was not enough to offset a substantial decline in Asian entries (-15.3%).

Overall, the preliminary indicators suggest that July was a relatively weak month for tourism in BC.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

Special Focus: Quarterly Review of The British Columbia Tourism Sector

Room revenues pick up speed in second quarter

Room revenues in British Columbia remained robust (+2.7%, *seasonally adjusted*) in the second quarter of 2004, posting a fourth consecutive quarterly gain. The solid growth in the first (+1.2%) and second (+2.7%) quarters of this year, although slower than in the last quarter of 2003 (+5.0%), boosted room revenues to a record high of $396 million[1].

Mainland/Southwest led second quarter growth

Revenues in Mainland/Southwest (Greater Vancouver and surrounding areas such as Whistler) rose substantially in the second quarter (+6.2%). The region was the main source of the overall growth in room revenues during that period.

Revenues declined in Vancouver Island/Coast (-2.4%), Thompson Okanagan (-0.7%) and Kootenay (-3.1%). However, the gain in Mainland/Southwest was more than enough to offset losses in these regions.

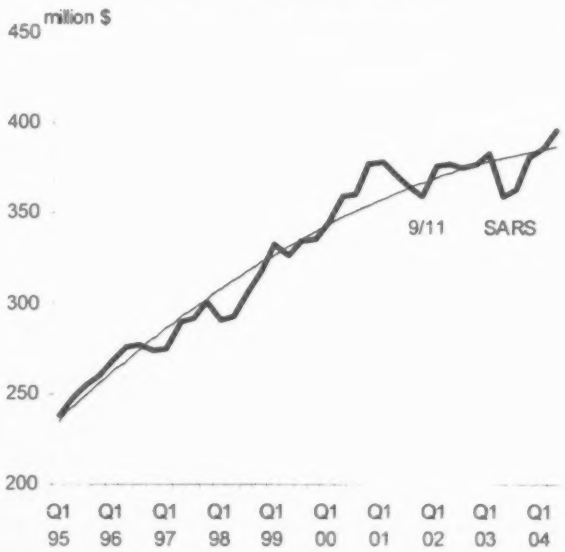
Cariboo (+0.1%), North Coast (+0.3%), Nechako (+9.6%) and Northeast (+2.0%) recorded revenue gains in the second quarter of 2004. These regions, the sparsely-populated central and northern areas of the province, together generated 8% of total accommodation revenues in BC.

Room revenues show fast recovery from external shocks

In the last three years BC's tourism sector has been hit by a number of external shocks, including the 9/11 terrorist attacks, the SARS outbreak in March 2003, and the effects of the war in Iraq. These events, coupled with weaker global economies and a stronger Canadian dollar, have had a significant effect on British Columbia's accommodation industry.

Room revenues, which were already in a decline before the 9/11 attacks, remained weak throughout 2001, but had bounced back to pre-9/11 levels by early 2002. Similarly revenues plunged (-6.3%) in the second quarter of 2003, when the SARS outbreak caused visitors, particularly those from Asia, to severely curtail their visits to BC and the rest of Canada. At the same time, the war in Iraq helped keep the lid on travel to BC from the US. The second-quarter decline in 2003 was the largest since 1995, the first year for which consistent room revenue figures are available.

Room revenues back on track



Source: BC Stats

However, over the long run, BC's accommodation industry has displayed an ability to absorb shocks. Following September 11th, it took only one quarter for room revenues to bounce back up. In the case of the SARS

[1] 1995 is the first year for which consistent room revenue figures are available.

outbreak, room revenues recovered and passed the pre-SARS level in just three quarters. The forest fire situation in the Interior last summer slowed, but did not stop, the recovery.

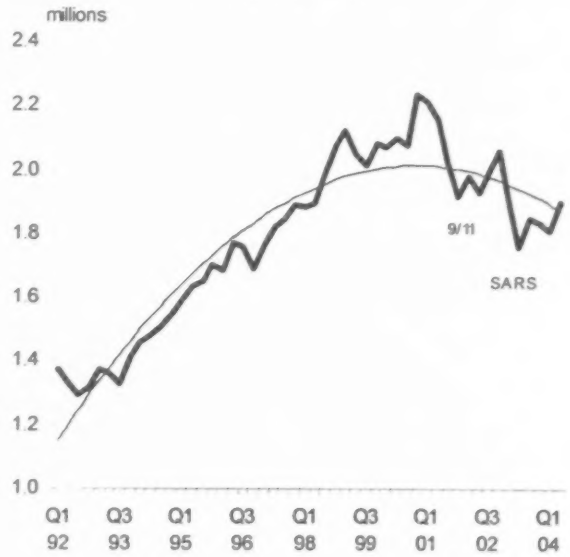
Accommodation properties provide services to residents of the province as well as those from further afield, so are not completely dependent on non-resident demand for their services. This may help explain the relatively quick recovery of room revenues in late 2001 and during the summer of last year.

Visitor entries rebound in the second quarter

The number of visitors entering Canada through BC rebounded in the second quarter (+5.1%, *seasonally adjusted*), after two consecutive quarterly declines. Travel from the US increased significantly (+3.1%), while the number of overseas visitors jumped 14.0%, the most notable increase in overseas entries since 1992. Contributing to the upturn were travellers from Oceania (Australia and the South Pacific, +16.7%) and Asia (+16.1%), followed by Europe (+5.6%).

However, the long-term trend in visitor entries is less rosy. Compared to room revenues, the volume of visitors entering BC, especially from the US, is more sensitive to external factors and takes longer to recover from shocks. Visitor entries shrank 11.1% in the two quarters after September 11th, and 14.6% in the second and third quarters of 2003. Entries remain well below previously recorded levels. The number of entries in the second quarter of 2004 was only 85% of the peak reached in the fourth quarter of 2000.

Visitor entries on the way up, but have not fully recovered



Other tourism indicators

Hotel occupancy rates averaged 62.2% (*seasonally adjusted*) in the second quarter of 2004, the highest rate reported in five years. Average room rates ($115.83) were 1.9% higher than in the first quarter this year. The gains in both occupancy rates and room rates, together with room revenues, indicate a favourable quarter for BC's accommodation properties.

Vehicle traffic on BC Ferries was up slightly (+0.8%) relative to the first quarter of this year. The Coquihalla highway had 4.3% more passenger vehicles passing through its tollbooths in the second quarter of 2004.

Passenger traffic was higher than in the first quarter, both on BC Ferries (+1.8%) and at Vancouver International Airport (+4.1%), with the number of overseas passengers jumping 9.8%.

Table 1: Room Revenue by Development Region ($000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Jun-03	21,926	62,843	17,710	5,868	3,618	1,555	710	3,550	117,780
Jul-03	21,922	64,365	17,167	5,935	3,542	1,574	724	3,793	119,021
Aug-03	22,594	67,290	17,261	5,751	3,551	1,633	726	4,024	122,830
Sep-03	22,463	66,800	16,718	5,753	3,493	1,604	728	3,571	121,131
Oct-03	23,394	67,336	17,840	6,194	3,761	1,601	758	3,817	124,721
Nov-03	23,532	68,430	18,039	6,004	3,674	1,631	716	3,796	125,821
Dec-03	23,874	69,826	19,841	6,494	3,761	1,753	729	4,206	130,483
Jan-04	25,312	68,606	18,733	6,425	3,597	1,683	716	3,920	128,991
Feb-04	23,919	69,342	18,658	6,699	3,625	1,651	721	4,273	128,889
Mar-04	23,623	69,038	18,882	6,202	3,838	1,590	618	4,283	128,074
Apr-04	23,738	73,117	18,560	6,477	3,650	1,664	790	5,045	133,041
May-04	23,506	73,219	18,848	6,129	3,658	1,614	729	3,830	131,533
Jun-04	23,977	73,853	18,494	6,205	3,777	1,664	737	3,859	132,566
Month-over-month growth rates									
Jun-03	-1.6	-4.9	2.7	-0.6	0.6	1.0	-5.3	-7.2	-2.8
Jul-03	0.0	2.4	-3.1	1.2	-2.1	1.2	2.0	6.8	1.1
Aug-03	3.1	4.5	0.5	-3.1	0.2	3.7	0.3	6.1	3.2
Sep-03	-0.6	-0.7	-3.1	0.0	-1.6	-1.8	0.3	-11.2	-1.4
Oct-03	4.1	0.8	6.7	7.7	8.3	-0.2	4.1	6.9	3.0
Nov-03	0.6	1.6	1.1	-3.1	-2.8	1.9	-5.7	-0.5	0.9
Dec-03	1.5	2.0	10.0	8.2	2.4	7.5	1.8	10.8	3.7
Jan-04	6.0	-1.7	-5.6	-1.1	-4.4	-4.0	-1.7	-6.8	-1.1
Feb-04	-5.5	1.1	-0.4	4.3	0.8	-1.9	0.7	9.0	-0.1
Mar-04	-1.2	-0.4	1.2	-7.4	5.9	-3.7	-14.4	0.2	-0.6
Apr-04	0.5	5.9	-1.7	4.4	-4.9	4.6	27.9	17.8	3.9
May-04	-1.0	0.1	1.6	-5.4	0.2	-3.0	-7.7	-24.1	-1.1
Jun-04	2.0	0.9	-1.9	1.2	3.3	3.1	1.0	0.7	0.8

June month-over-month percent growth

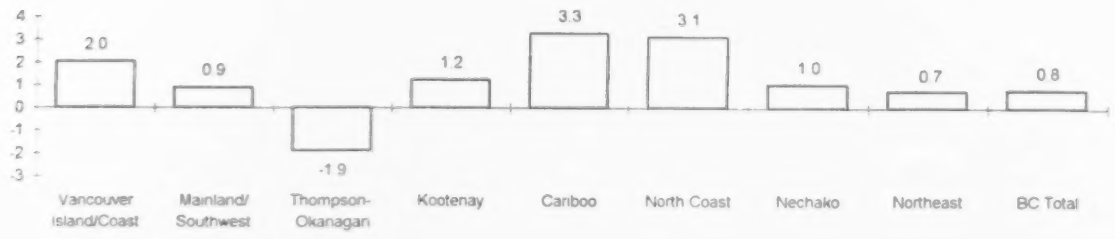


Table 2: Room Revenue by Accommodation Type ($000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			
Annual data							
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
Annual growth rates							
1999	5.4	15.3	15.3	12.9	2.2	19.2	12.0
2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
Monthly data							
Jun-03	33,913	14,059	24,131	14,193	14,917	9,787	7,659
Jul-03	33,998	14,327	24,107	14,249	14,592	9,901	7,658
Aug-03	36,903	14,919	24,803	14,575	14,659	9,891	7,624
Sep-03	35,585	14,872	24,663	14,226	13,898	9,488	7,847
Oct-03	36,294	15,428	25,455	14,744	15,819	9,770	7,961
Nov-03	36,041	15,647	25,716	14,594	15,317	10,075	7,662
Dec-03	39,676	15,980	25,453	14,859	16,833	10,634	8,808
Jan-04	36,151	15,831	25,785	15,072	15,777	9,709	8,250
Feb-04	36,659	15,541	25,918	14,736	15,744	9,918	8,067
Mar-04	38,214	16,142	26,036	14,822	15,810	9,412	7,430
Apr-04	39,804	15,674	26,589	15,235	15,653	9,994	8,575
May-04	40,376	16,201	26,709	15,221	15,615	10,245	7,898
Jun-04	40,258	16,574	26,751	15,407	15,804	10,209	7,958
Month-over-month growth rates							
Jun-03	-3.7	-3.2	0.9	-1.8	1.2	-1.8	-0.9
Jul-03	0.2	1.9	-0.1	0.4	-2.2	1.2	0.0
Aug-03	8.5	4.1	2.9	2.3	0.5	-0.1	-0.5
Sep-03	-3.6	-0.3	-0.6	-2.4	-5.2	-4.1	2.9
Oct-03	2.0	3.7	3.2	3.6	13.8	3.0	1.5
Nov-03	-0.7	1.4	1.0	-1.0	-3.2	3.1	-3.8
Dec-03	10.1	2.1	-1.0	1.8	9.9	5.5	15.0
Jan-04	-8.9	-0.9	1.3	1.4	-6.3	-8.7	-6.3
Feb-04	1.4	-1.8	0.5	-2.2	-0.2	2.2	-2.2
Mar-04	4.2	3.9	0.5	0.6	0.4	-5.1	-7.9
Apr-04	4.2	-2.9	2.1	2.8	-1.0	6.2	15.4
May-04	1.4	3.4	0.5	-0.1	-0.2	2.5	-7.9
Jun-04	-0.3	2.3	0.2	1.2	1.2	-0.3	0.8

June month-over-month percent growth

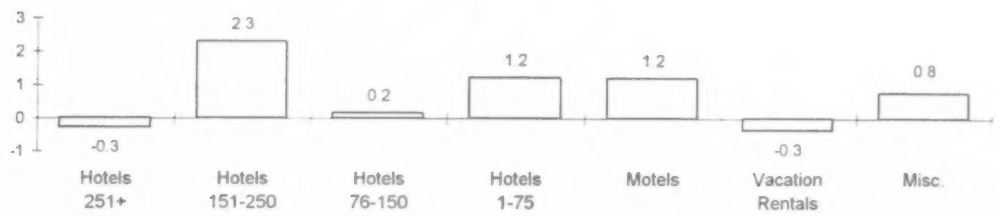


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Jun-04	Revenue ($000) YTD 04	Revenue % change from Jun-03	Revenue % change from YTD 03	Properties (#) Jun-04	Properties # chg from Jun-03	Rooms (#) Jun-04	Rooms # chg from Jun-03
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	18,331	68,759	9.6	7.4	187	5	8,324	307
Total - Hotels	14,815	57,476	10.9	9.4	68	1	5,547	206
76+ Rooms	11,534	44,945	13.2	12.6	26	1	3,937	236
1-75 Rooms	3,281	12,531	3.7	-0.8	42	0	1,610	-30
Motels	1,509	5,626	1.7	0.3	29	-1	1,087	7
Vacation Rentals	581	1,864	-20.1	-22.9	27	-1	343	5
19 Cowichan Valley								
Total - All accommodation types	889	3,564	5.9	5.9	36	0	664	0
Motels	173	851	10.7	14.0	15	0	296	0
21 Nanaimo								
Total - All accommodation types	3,763	15,489	4.5	4.4	78	-1	2,654	-189
Total - Hotels	1,814	8,337	4.7	7.0	19	-1	1,224	-191
Motels	854	3,088	15.9	4.7	26	0	672	7
Vacation Rentals	774	3,298	-5.7	-1.1	22	0	601	-3
23 Alberni-Clayoquot								
Total - All accommodation types	3,950	13,769	12.2	9.0	68	2	1,492	25
Total - Hotels	1,029	3,818	15.0	15.8	12	0	413	-15
Motels	417	1,311	-3.5	0.9	20	-2	405	-22
Vacation Rentals	1,372	4,750	15.6	4.5	16	3	340	64
25 Comox-Strathcona								
Total - All accommodation types	3,022	12,463	9.3	5.5	89	3	2,104	8
Fishing lodges	662	1,421	0.1	5.7	24	4	399	59
Motels	760	3,301	23.4	9.8	27	1	702	7
Vacation Rentals	345	1,404	18.8	5.3	21	0	253	12
27 Powell River								
Total - All accommodation types	449	2,189	17.7	54.5	22	1	414	-2
43 Mount Waddington								
Total - All accommodation types	690	1,855	0.2	-6.1	29	0	651	-86
Total - Hotels	398	1,117	-4.4	-10.3	11	-2	446	-99
45 Central Coast								
Total - All accommodation types	267	681	3.3	-1.6	11	-2	157	-11
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	3,322	16,862	4.7	6.1	70	-1	2,502	-14
Total - Hotels	2,363	12,320	4.3	5.6	20	-1	1,380	-18
Motels	739	3,144	7.5	9.8	39	1	964	9
15 Greater Vancouver								
Total - All accommodation types	69,862	285,706	15.9	13.1	249	-6	27,288	-18
Total - Hotels	65,337	270,935	16.0	13.7	160	-3	23,246	-61
251+ Rooms	36,440	151,112	15.3	14.4	25	0	9,956	0
151-250 Rooms	12,510	50,899	17.0	12.4	25	0	4,752	-1
76-150 Rooms	12,211	51,763	16.7	12.6	54	0	5,849	3
1-75 Rooms	4,176	17,161	17.3	14.4	56	-3	2,689	-63
Motels	1,731	7,140	19.8	2.2	37	-1	1,617	2
Vacation Rentals	940	3,697	22.9	11.6	20	1	584	51
29 Sunshine Coast								
Total - All accommodation types	358	1,559	-0.6	9.1	23	1	374	13
31 Squamish-Lillooet								
Total - All accommodation types	8,055	114,783	35.5	-10.1	101	6	7,445	375
Total - Hotels	6,937	92,045	36.8	-8.5	46	3	5,703	320
151+ Rooms	4,746	60,809	43.7	-10.2	11	1	3,429	276
76-150 Rooms	1,680	23,474	29.0	-4.9	15	0	1,519	0
1-75 Rooms	512	7,762	9.2	-5.8	20	2	755	44
Vacation Rentals	619	16,228	37.5	-14.6	27	2	1,192	54
Miscellaneous	320	5,722	24.9	-20.2	20	1	378	1
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	3,905	12,987	-7.0	6.1	121	-3	3,222	-235
Total - Hotels	1,916	7,406	-4.9	5.4	17	0	1,165	-95
Motels	1,519	4,357	-6.5	9.1	78	-3	1,782	-61
Vacation Rentals	387	944	-10.6	4.7	14	-1	179	-83

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Jun-04	Revenue ($000) YTD 04	Revenue % change from Jun-03	Revenue % change from YTD 03	Properties (#) Jun-04	Properties # chg from Jun-03	Rooms (#) Jun-04	Rooms # chg from Jun-03
33 Thompson-Nicola								
Total - All accommodation types	7,042	30,011	20.4	13.9	170	-5	5,648	18
Fishing lodges	320	472	2.3	0.9	17	0	182	-3
Total - Hotels	3,324	13,634	32.4	18.4	35	1	2,258	46
1-75 Rooms	706	2,561	21.6	7.3	23	1	869	46
Motels	2,398	7,959	29.8	15.9	77	-1	2,283	1
Vacation Rentals	544	6,094	-18.1	8.0	21	-3	523	-20
Miscellaneous	455	1,852	-11.4	0.5	20	-2	402	-6
35 Central Okanagan								
Total - All accommodation types	6,293	29,166	-5.5	3.7	67	-2	3,516	-150
Total - Hotels	4,443	19,792	-4.7	4.3	18	0	1,706	-2
Motels	1,203	4,853	-16.0	0.9	29	1	1,174	6
Vacation Rentals	430	3,940	57.0	4.1	15	-1	239	-130
37 North Okanagan								
Total - All accommodation types	1,375	9,302	-11.6	-3.9	48	-1	1,497	40
Motels	605	2,435	28.3	28.1	20	1	652	107
39 Columbia-Shuswap								
Total - All accommodation types	3,295	14,562	4.8	6.6	105	-5	3,241	-60
Total - Hotels	1,631	6,267	8.5	12.2	18	-1	1,220	-15
Motels	1,302	4,990	6.7	9.4	50	0	1,528	-10
Vacation Rentals	274	656	-6.3	-1.2	15	-2	184	-27
Kootenay								
01 East Kootenay								
Total - All accommodation types	3,850	27,040	4.5	7.5	117	-5	4,564	66
Total - Hotels	1,231	8,555	6.2	2.7	24	-1	1,395	-3
Motels	1,058	4,481	2.5	3.9	52	-2	1,234	-24
Vacation Rentals	535	7,103	-8.8	25.1	16	-5	913	53
03 Central Kootenay								
Total - All accommodation types	1,622	7,659	6.5	5.8	83	0	1,646	21
Total - Hotels	900	4,262	12.2	8.0	19	1	791	57
Motels	419	1,758	2.5	-3.1	32	0	551	-37
Vacation Rentals	145	456	5.7	15.1	19	-1	141	-16
05 Kootenay Boundary								
Total - All accommodation types	445	2,810	3.8	2.3	38	-3	684	-43
Motels	284	1,330	9.5	3.0	24	-1	408	-9
Cariboo								
41 Cariboo								
Total - All accommodation types	1,898	6,916	1.2	3.6	117	-5	2,242	-15
Fishing lodges	152	229	-13.0	-5.5	16	-5	156	-44
Total - Hotels	480	2,095	-1.0	4.9	12	1	540	16
Motels	906	3,764	2.1	4.5	36	-1	1,032	-44
Vacation Rentals	161	276	0.7	1.4	36	-2	348	53
Miscellaneous	200	553	17.7	-1.6	17	2	166	4
53 Fraser-Fort George								
Total - All accommodation types	2,793	12,778	7.0	4.0	58	3	2,709	40
Total - Hotels	1,986	9,215	12.0	5.1	18	0	1,392	0
Motels	742	3,027	-3.6	2.1	30	2	995	36
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	1,883	4,550	-1.1	3.1	40	-2	1,147	-76
49 Kitimat-Stikine								
Total - All accommodation types	899	3,655	27.7	5.6	39	3	873	0
Motels	324	1,302	32.5	-4.0	16	-1	386	-33
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	975	3,555	5.1	-3.5	55	-2	1,176	-94
Motels	546	2,042	3.0	-5.1	25	-1	651	-34
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	3,231	27,426	12.0	10.7	68	3	3,469	949
Total - Hotels	1,838	12,461	21.4	23.8	22	2	1,514	168
Motels	1,064	5,654	6.7	10.5	34	1	943	23

"." Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue ($000)		Revenue % change from		Properties (#)	Properties # chg from	Rooms (#)	Rooms # chg from
	Jun-04	YTD 04	Jun-03	YTD 03	Jun-04	Jun-03	Jun-04	Jun-03
Vancouver Island/Coast	31,361	118,768	8.9	7.2	520	8	16,460	52
Victoria (C)	14,439	55,827	10.2	9.4	88	3	5,611	174
Other CRD	3,892	12,933	7.2	-0.6	99	2	2,713	133
Nanaimo (C)	2,034	8,821	11.5	6.0	24	0	1,244	0
Port Alberni (C)	443	1,483	16.8	7.1	14	0	375	-13
Courtenay (C)	704	3,866	4.9	2.8	12	1	489	4
Rest of Development Region	9,849	35,839	7.3	7.8	295	3	6,028	-246
Mainland/Southwest	**81,598**	**418,909**	**17.0**	**5.4**	**443**	**0**	**37,609**	**356**
Downtown Vancouver (C)	46,872	184,064	16.9	15.8	82	-2	12,775	-135
Other Vancouver (C)	3,476	13,660	11.7	6.4	39	-4	2,729	-80
Richmond (C)	9,633	44,408	15.0	10.9	25	1	4,337	70
Burnaby (C)	2,697	12,395	17.6	9.7	12	0	1,635	362
Other GVRD	7,184	31,179	12.5	5.7	91	-1	5,812	127
Whistler (DM)	7,420	111,636	36.9	-10.1	76	5	6,875	352
Rest of Development Region	4,316	21,567	6.4	3.9	118	1	3,446	-340
Thompson/Okanagan	**21,910**	**96,028**	**2.3**	**6.6**	**511**	**-16**	**17,124**	**-387**
Penticton (C)	2,227	8,103	-7.8	6.5	49	-1	1,799	-153
Kamloops (C)	4,983	24,031	35.7	16.9	69	-3	3,637	27
Kelowna (C)	5,510	26,837	-6.7	2.5	51	0	2,949	-46
Vernon (C)	1,248	8,953	-12.4	-4.0	28	-1	1,294	40
Revelstoke (C)	1,148	6,158	9.9	2.8	28	-3	1,203	-70
Rest of Development Region	6,793	21,945	-2.2	7.7	286	-8	6,242	-185
Kootenay	**6,917**	**37,510**	**5.0**	**8.7**	**238**	**-8**	**6,894**	**44**
Cranbrook (C)	861	3,325	10.6	4.7	18	-1	890	-2
Nelson (C)	528	2,835	7.9	7.2	12	0	425	-2
Rest of Development Region	4,528	31,350	3.7	6.9	220	-7	6,004	46
Cariboo	**4,691**	**19,694**	**4.6**	**3.9**	**175**	**-2**	**4,961**	**25**
Quesnel (C)	326	1,591	-4.0	8.5	13	0	452	0
Williams Lake (C)	476	2,015	-3.6	-1.3	12	0	574	-34
Prince George (C)	2,066	9,826	6.3	3.9	31	3	1,946	40
Rest of Development Region	1,823	6,262	6.7	4.5	119	-5	1,979	19
North Coast	**2,781**	**8,205**	**6.6**	**4.2**	**79**	**1**	**2,020**	**-76**
Prince Rupert (C)	913	2,948	2.1	4.6	16	-1	773	-70
Terrace (C)	472	2,147	22.2	6.6	11	0	385	-26
Rest of Development Region	1,396	3,111	5.2	2.2	52	2	862	20
Nechako	**975**	**3,555**	**5.1**	**-3.5**	**55**	**-2**	**1,176**	**-94**
Smithers (T)	459	1,668	13.6	-0.9	13	-1	424	-1
Rest of Development Region	517	1,886	-1.4	-5.7	42	-1	752	327
Northeast	**3,231**	**27,426**	**12.0**	**10.7**	**68**	**3**	**3,459**	**949**
Dawson Creek (C)	588	3,138	24.6	24.6	13	-1	484	-11
Fort St. John (C)	1,168	11,167	15.7	15.7	18	0	1,506	73
Rest of Development Region	1,476	13,122	5.1	4.2	37	4	1,479	887

"-" Data for regions with fewer than 10 properties reporting can not be released.

Table 5: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Jun-03	28,787	69,739	21,407	5,635	4,485	2,608	928	2,885	136,475
Jul-03	39,350	86,148	32,863	8,643	5,169	3,103	1,058	3,762	180,097
Aug-03	47,004	101,199	37,026	9,969	5,569	3,107	1,142	3,978	208,993
Sep-03	31,458	72,552	20,022	6,662	4,774	2,338	1,091	3,536	142,433
Oct-03	19,909	52,270	13,801	4,244	3,775	1,207	963	3,455	99,623
Nov-03	12,753	41,418	8,039	2,484	2,622	903	538	2,967	71,724
Dec-03	11,763	59,336	11,652	5,024	2,199	831	454	3,803	95,060
Jan-04	10,891	59,530	12,523	5,875	2,276	791	415	4,428	96,729
Feb-04	14,125	68,452	15,086	8,185	2,450	1,033	459	6,323	116,112
Mar-04	17,288	74,357	15,792	7,768	3,224	1,040	507	6,565	126,540
Apr-04	19,496	63,491	12,684	5,004	3,223	1,056	545	4,482	109,981
May-04	25,608	71,481	18,034	4,761	3,831	1,504	652	2,397	128,269
Jun-04	31,361	81,598	21,910	5,917	4,691	2,781	975	3,231	152,465
Year-over-year percent changes									
Jun-03	-3.3	-15.3	6.0	-3.1	-0.8	0.3	-0.6	16.8	-8.2
Jul-03	-0.6	-10.2	1.7	3.0	-0.5	0.3	0.4	38.1	-4.3
Aug-03	2.5	-3.6	-1.0	-8.9	-6.7	2.7	3.3	31.1	-1.6
Sep-03	2.5	-3.8	-4.5	-7.5	-7.4	-0.6	-1.1	4.5	-2.6
Oct-03	7.0	-5.8	3.1	7.1	1.4	5.2	-6.5	8.4	-0.9
Nov-03	7.1	-0.9	7.6	0.0	-0.5	4.4	-8.1	18.7	2.1
Dec-03	4.6	0.0	12.7	13.6	6.6	27.1	3.0	70.9	4.8
Jan-04	13.9	-4.4	3.3	8.0	1.1	8.0	-6.0	10.5	-0.1
Feb-04	9.7	-5.5	11.6	12.1	8.4	6.9	-14.0	24.7	1.0
Mar-04	3.8	1.4	7.0	0.3	7.8	-7.2	-15.9	-4.2	2.0
Apr-04	5.9	14.1	6.6	15.2	1.0	5.0	7.0	28.3	11.6
May-04	4.7	11.5	10.4	1.7	1.3	4.3	-2.1	-2.2	8.8
Jun-04	8.9	17.0	2.3	5.0	4.6	6.6	5.1	12.0	11.7

June year-over-year percent change

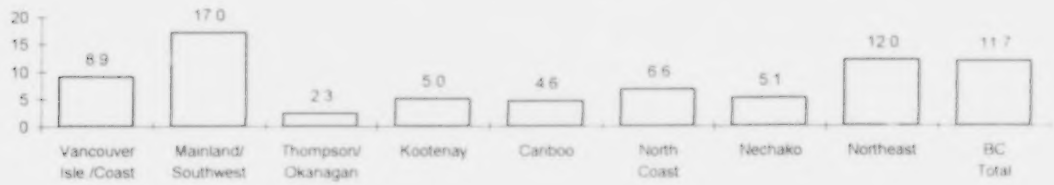


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**
Annual data								
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,960.1	6,583.2	2,808.1	3,787.8	1,376.9	764.0	411.8	118.0
2003	7,327.5	6,125.2	2,580.7	3,556.7	1,202.3	577.6	410.1	124.8
Annual percent changes								
1999	5.4	4.8	7.9	2.0	8.6	9.7	7.8	6.6
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.2	-4.5	-13.8	4.2	-2.9	4.4	-11.7	-10.5
2003	-7.9	-7.0	-8.1	-6.1	-12.7	-24.4	-0.4	5.8
Monthly data								
Jul-03	607.5	511.7	210.7	296.3	95.9	43.6	32.2	10.2
Aug-03	624.0	522.0	215.4	302.7	102.0	49.5	33.1	10.6
Sep-03	618.1	515.2	215.2	294.8	102.9	50.9	33.4	11.3
Oct-03	614.4	509.1	217.9	295.2	105.3	57.5	33.7	9.7
Nov-03	608.0	502.4	211.7	291.3	105.6	55.3	34.3	10.2
Dec-03	611.9	504.7	210.8	293.5	107.2	55.4	34.3	11.1
Jan-04	594.9	487.0	204.2	284.9	107.9	55.6	34.2	11.7
Feb-04	599.5	488.4	206.1	286.1	111.1	55.4	35.1	10.8
Mar-04	613.5	505.3	210.2	299.7	108.3	57.1	35.1	9.3
Apr-04	628.2	510.0	210.2	302.1	118.2	61.6	35.5	11.7
May-04	631.4	504.9	203.8	301.0	126.5	64.0	38.0	13.0
Jun-04	640.8	512.4	212.4	298.9	128.4	68.1	38.2	12.8
Jul-04	635.0	511.2	212.5	298.1	123.8	57.7	41.0	12.8
Month-over-month growth rates								
Jul-03	1.9	1.6	0.8	1.4	3.5	16.9	-1.1	-6.3
Aug-03	2.7	2.0	2.2	2.2	6.5	13.6	3.1	4.1
Sep-03	-0.9	-1.3	-0.1	-2.6	0.9	2.7	0.8	6.6
Oct-03	-0.6	-1.2	1.3	0.1	2.3	13.1	0.7	-14.2
Nov-03	-1.0	-1.3	-2.9	-1.3	0.3	-3.9	1.8	5.3
Dec-03	0.6	0.4	-0.4	0.8	1.6	0.3	0.1	9.3
Jan-04	-2.8	-3.5	-3.1	-2.9	0.6	0.3	-0.2	5.3
Feb-04	0.8	0.3	1.0	0.4	3.0	-0.4	2.6	-7.5
Mar-04	2.3	3.5	2.0	4.7	-2.6	3.2	-0.1	-14.4
Apr-04	2.4	0.9	0.0	0.8	9.2	7.9	1.3	25.7
May-04	0.5	-1.0	-3.0	-0.4	7.0	3.9	6.9	11.7
Jun-04	1.5	1.5	4.2	-0.7	1.5	6.4	0.6	-1.4
Jul-04	-0.9	-0.2	0.1	-0.3	-3.6	-15.3	7.3	-0.2

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquihalla Hwy
	Total	Domestic	Trans-border	Other Int'l.	Total	Vehicles	Passengers	Passenger Vehicles
Annual data								
1999	15,807	8,314	4,120	3,372	1,191.6	7,852	21,369	2,388
2000	16,033	8,306	4,074	3,652	1,139.4	7,887	21,280	2,400
2001	15,477	7,869	4,001	3,608	1,158.1	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102.2	8,272	21,540	2,530
2003	14,322	7,266	3,814	3,241	1,182.9	8,263	21,348	2,480
Annual growth rates								
1999	1.9	1.2	-0.1	6.4	-1.9	0.4	-0.2	0.5
2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.6	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
Monthly data								
Jul-03	1,194	609	325	261	100.0	695	1,784	209
Aug-03	1,236	618	341	277	101.4	699	1,813	200
Sep-03	1,228	621	324	284	102.1	696	1,789	196
Oct-03	1,236	627	319	290	104.8	695	1,786	218
Nov-03	1,262	631	328	303	103.8	689	1,769	196
Dec-03	1,272	646	325	301	105.9	645	1,681	209
Jan-04	1,253	633	321	299	104.2	679	1,751	196
Feb-04	1,279	662	326	291	105.8	708	1,816	213
Mar-04	1,269	648	326	296	102.3	716	1,835	222
Apr-04	1,293	650	335	308	104.7	712	1,870	222
May-04	1,297	651	325	321	103.0	702	1,819	215
Jun-04	1,297	660	316	321	103.6	702	1,809	214
Jul-04	1,160	602	268	290	104.4	706	1,820	218
Month-over-month growth rates								
Jul-03	7.3	5.6	4.6	15.3	5.4	-0.1	-0.1	-5.7
Aug-03	3.5	1.4	4.9	6.4	1.4	0.6	1.6	-4.5
Sep-03	-0.6	0.5	-5.0	2.3	0.7	-0.4	-1.3	-1.8
Oct-03	0.7	1.0	-1.3	2.3	2.6	-0.2	-0.2	11.5
Nov-03	2.1	0.8	2.6	4.3	-1.0	-0.8	-1.0	-10.1
Dec-03	0.8	2.3	-0.8	-0.7	2.0	-6.4	-5.0	6.4
Jan-04	-1.5	-2.0	-1.3	-0.7	-1.6	5.2	4.2	-6.1
Feb-04	2.1	4.5	1.7	-2.5	1.5	4.3	3.7	8.4
Mar-04	-0.8	-2.1	-0.2	1.4	-3.3	1.2	1.1	4.5
Apr-04	1.9	0.3	2.9	4.3	2.3	-0.5	1.9	-0.4
May-04	0.3	0.2	-3.1	4.0	-1.6	-1.5	-2.7	-2.9
Jun-04	0.0	1.4	-2.9	0.1	0.6	0.1	-0.5	-0.7
Jul-04	-10.5	-8.8	-15.2	-9.5	0.8	0.5	0.6	2.1

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry[2]		Consumer Price Index[1]	
	Total tourism related	Air transport[4]	Accom-modation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%)[3]	Room Rate ($)	Traveller accom-modation	Restaurant food[4]
Annual data									
1999	181.7	15.3	29.2	110.1	27.1	61.7	112.03	133.1	115.6
2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	116.99	124.1	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.76	111.8	127.6
Annual Growth Rates									
1999	-1.5	-3.6	-0.5	0.4	-8.5	-0.3	3.1	2.4	1.5
2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.7	0.7	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.1	-2.8	-9.9	1.8
Monthly data									
Jul-03	193.4	12.7	28.8	118.2	33.7	57.1	112.70	108.9	127.8
Aug-03	193.4	12.5	29.3	117.9	33.7	59.0	112.80	108.8	128.1
Sep-03	190.0	12.6	29.1	115.2	33.0	57.7	113.80	107.0	128.2
Oct-03	189.2	12.7	28.7	116.0	31.8	59.7	114.40	108.6	128.3
Nov-03	192.6	12.6	28.3	118.4	33.2	60.4	113.80	108.0	128.7
Dec-03	193.7	12.2	28.2	120.0	33.3	60.6	114.70	106.7	128.6
Jan-04	194.7	12.8	27.6	120.5	33.8	60.2	114.00	104.2	128.9
Feb-04	191.8	13.0	27.5	117.9	33.4	59.0	113.40	103.0	129.0
Mar-04	193.6	12.7	27.5	118.3	35.1	61.2	113.60	102.9	129.2
Apr-04	192.4	12.7	27.7	117.6	34.4	62.1	115.90	102.6	129.7
May-04	192.2	12.8	28.3	117.0	34.1	61.8	115.70	102.3	129.8
Jun-04	192.4	13.2	27.6	117.6	34.0	62.5	115.50	102.1	129.9
Jul-04	192.0	12.9	27.7	117.0	34.4	61.7	115.20	101.5	129.9
Month-over-month growth rates									
Jul-03	-0.1	-2.1	0.2	1.3	-4.2	0.7	2.0	-1.1	0.4
Aug-03	0.0	-1.4	1.5	-0.3	0.1	1.9	0.1	-0.1	0.2
Sep-03	-1.8	0.8	-0.5	-2.3	-2.0	-1.3	0.9	-1.7	0.1
Oct-03	-0.4	0.4	-1.5	0.7	-3.5	2.0	0.5	1.5	0.1
Nov-03	1.8	-0.3	-1.2	2.0	4.4	0.7	-0.5	-0.6	0.3
Dec-03	0.6	-3.6	-0.3	1.3	0.1	0.2	0.8	-1.2	-0.1
Jan-04	0.5	4.8	-2.2	0.4	1.5	-0.4	-0.6	-2.3	0.2
Feb-04	-1.5	1.5	-0.3	-2.2	-1.0	-1.2	-0.5	-1.2	0.1
Mar-04	1.0	-1.7	-0.1	0.4	5.0	2.2	0.2	-0.1	0.2
Apr-04	-0.7	-0.3	0.6	-0.6	-2.1	0.9	2.0	-0.3	0.4
May-04	-0.1	0.5	2.2	-0.5	-0.6	-0.3	-0.2	-0.3	0.1
Jun-04	0.1	3.0	-2.4	0.5	-0.4	0.7	-0.2	-0.2	0.1
Jul-04	-0.2	-1.8	0.3	-0.5	1.1	-0.8	-0.3	-0.6	0.0

[1]Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

[2]Source: Pannell Kerr Forster and BC Stats

[3]Occupancy Rate change expressed as percentage point change

[4] No identifiable seasonality

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns [1]					
	Receipts ($ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
Annual data						
1999	4,467.5	369.8	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
2003	5,388.8	284.4	5,104.3	33,648.9	2,089.1	31,559.8
Annual growth rates						
1999	-3.7	-7.3	-3.4	4.3	12.9	3.6
2000	8.1	-2.9	9.1	7.5	8.4	7.4
2001	7.1	-0.3	7.7	6.6	3.2	6.8
2002	-1.5	-14.6	-0.5	2.8	-1.7	3.1
2003	5.6	-7.0	6.4	1.6	-6.8	2.2
Monthly data						
Apr-03	427	24	403	2,722	178	2,544
May-03	430	24	406	2,774	173	2,602
Jun-03	430	24	406	2,778	175	2,603
Jul-03	451	24	427	2,794	181	2,612
Aug-03	460	24	436	2,820	174	2,646
Sep-03	464	23	441	2,828	168	2,660
Oct-03	470	22	448	2,866	168	2,698
Nov-03	477	23	454	2,887	169	2,717
Dec-03	478	24	454	2,882	167	2,715
Jan-04	479	22	456	2,869	158	2,711
Feb-04	485	23	463	2,923	166	2,757
Mar-04	498	23	475	2,941	169	2,771
Apr-04	518	24	494	2,949	167	2,781
Month-over-month growth rates						
Apr-03	-0.5	3.8	-0.8	-1.5	0.6	-1.6
May-03	0.6	-3.0	0.8	1.9	-3.1	2.3
Jun-03	0.1	1.4	0.0	0.1	1.3	0.0
Jul-03	5.0	1.3	5.2	0.6	3.5	0.4
Aug-03	2.0	-1.1	2.2	0.9	-3.9	1.3
Sep-03	0.7	-6.1	1.1	0.3	-3.6	0.5
Oct-03	1.4	-1.8	1.5	1.4	0.3	1.4
Nov-03	1.5	2.3	1.4	0.7	0.5	0.7
Dec-03	0.2	4.7	-0.1	-0.2	-1.4	-0.1
Jan-04	0.2	-5.5	0.5	-0.5	-5.4	-0.2
Feb-04	1.4	1.2	1.4	1.9	5.3	1.7
Mar-04	2.5	1.3	2.6	0.6	1.9	0.5
Apr-04	4.1	5.9	4.0	0.3	-1.3	0.4

[1]Source: Statistics Canada & BC Stats

BRITISH COLUMBIA

BC STATS

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Tourism Sector Monitor ◆ October 2004

Room Revenue

Room revenues edged up in July (+0.3%, *seasonally adjusted*), posting a second consecutive monthly gain, although growth was slower than in June, when revenues increased 1.0%. However, revenues picked up speed in the Kootenay (+3.9%), North Coast (+3.1%) and Thompson-Okanagan (+2.1%) regions. Nechako (-1.2%), Cariboo (-0.1%) and the province's largest region, Mainland Southwest (-0.8%) posted moderate declines in room revenues.

Room revenues inched up marginally

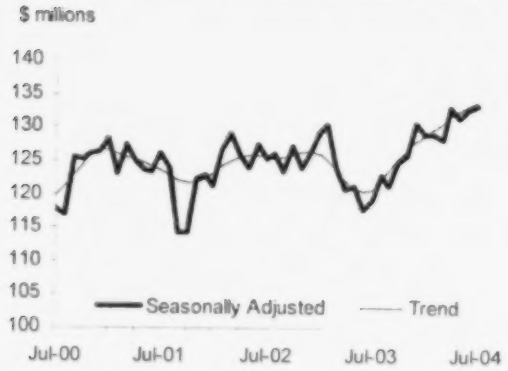


Table 1. Room Revenue
(seasonally adjusted)

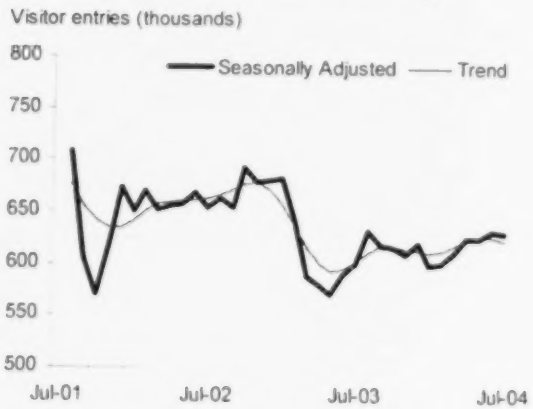
Accommodation Type	July 04 ($000)	June 04 ($000)	% change
Total	133,262	132,851	+0.3
Hotels	96,845	98,542	-1.7
Motels	16,206	15,903	+1.9
Other Acc.	18,920	18,326	+3.2
Regions (Top 3 performers)			
Kootenay	6,257	6,500	+3.9
North Coast	1,725	1,674	+3.1
Thompson-Okanagan	19,087	18,702	+2.1

Slower growth was due to sharp declines in revenue at very large hotels (with over 251 rooms) (-5.2%) followed by large hotels (with 151-250 rooms) (-1.1%). Smaller hotels (75 rooms or less) (+1.4%), motels (+1.9%) and vacation rentals (+1.9%) showed modest gains while other accommodation types (including fishing lodges, bed and breakfast and other similar establishments) recorded a strong boost (+4.9%) in revenues.

Visitor Entries

The number of visitors entering Canada via BC border crossings dropped (-1.0%) in July due to a general weakness in both US and overseas travel entries. The downturn experienced in entries from the US (-0.5%) was due to less travel from both same-day (-0.3%) and overnight (-0.4%) visitors. A particularly sharp decline in the Asian market (-10.6%) kept total overseas entries low (-3.0%).

Visitor entries declined in July



The number of overseas visitors from Europe soared (+8.7%) in July, the highest

jump since the beginning of the year. Particularly strong growth in German (+33.2%) visitors helped fuel this growth. Although BC received more European visitors in July the downturn in entries from Japan (-18.7%), Taiwan (-22.7%) and Hong Kong (-17.2%) offset that growth.

Table 2. Traveller Entries
(seasonally adjusted)

	Jul-04 ('000)	Jun-04 ('000)	% chg from Jun-04
American visitors			
Total	507	509	-0.5
Same-day	210	211	-0.3
Overnight	295	297	-0.4
Overseas visitors			
Total	120	124	-3.0
Europe	41	38	8.7
UK	20	19	3.4
Asia	58	65	-10.6
Japan	22	27	-18.7
Taiwan	7	9	-22.7
Oceania	13	13	-0.2

(BC STATS & Statistics Canada)

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

Both average room rates (-0.3%) and hotel occupancy (-1.0 percentage points) dropped in July. Employment in key tourism-related industries decreased (-0.1%) led by declines in accommodation (-1.5%), air transport (-0.2%) and food and beverage services (-0.1%).

Transportation indicators were weak in July with the exception of the Coquihalla Highway where passenger vehicles increased (+2.0%) following a downturn in June (-0.7%). Air traffic indicators were down at Vancouver airport (-1.0%) as fewer trans-border (-1.4%) and other international (-2.6%) passengers travelled through. Travellers at the Victoria airport rose marginally (+0.2%) in July. There was a modest increase in the number of passengers (+0.3%) and vehicles (+0.5%) aboard BC Ferries. In July, the Canadian dollar appreciated relative to the US currency as well as the Japanese Yen.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Jul-04	Change from Jun-04
Hotel Industry		
Occupancy rate	61.2	-1.0 pp
Average room charge *(Pannell Kerr Forster)*	115.20	-0.3%
Airport Passengers	**(000s)**	**(%)**
Vancouver International Airport		
Total traffic	1,307	-1.0
US (trans-border)	318	-1.4
Other International	322	-2.6
Canada (domestic) *(YVR)*	666	0.0
Victoria International Airport		
Total traffic *(Victoria Airport Authority)*	103	0.2
Transportation	**(000s)**	**(%)**
Coquihalla Highway		
Passenger Vehicles *(Ministry of Transportation & Highways)*	217	2.0
BC Ferries		
Vehicle Volume	705	0.5
Passenger Volume *(BC Ferries)*	1,814	0.3
Exchange Rates	**Cdn $**	
US $	0.756	0.02
UK Pound	0.410	0.01
Japanese Yen	82.850	2.26
Australian $ *(Statistics Canada)*	1.056	-0.01

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are now reported on a **seasonally adjusted** basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues decreased (-3.6%, *seasonally adjusted*) in August. Six out of eight

development regions in BC saw sharp declines in revenue including the largest region, Mainland-Southwest. The downturn in August was due to the loss of revenue for almost every type of tourism establishment, with motels (-6.4%) suffering the most.

Visitor entries were down (-3.9%) in August, particularly overseas entries from Asia (-8.4%), Europe (-10.0%) and same-day visitors from the US (-4.4%).

The number of passengers fell for almost all mediums of transportation. The highest declines were in the number of passengers on the Coquihalla Highway (-5.1%), at the Victoria airport (-2.9%) and international passengers (excluding US travellers) (-2.7%) at the Vancouver airport.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers – reported in the "look ahead" section – were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

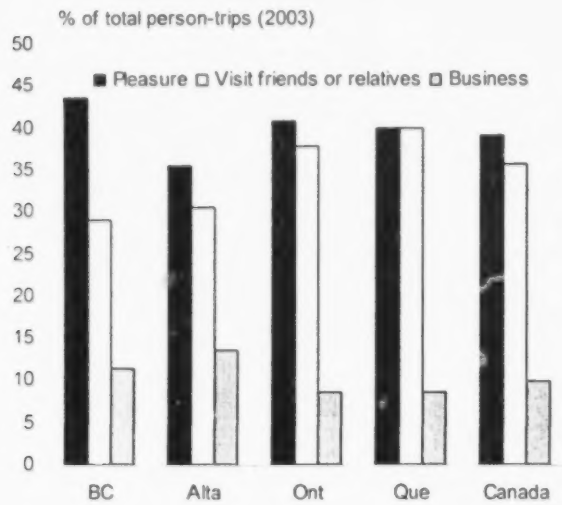
Special Focus: Canadian Travellers Vacation Interests in BC

British Columbia is Canada's prime four-season tourist destination for business and vacation travellers alike. Shouldering the Pacific Ocean to the west and the Rockies to the east, the province is blessed with a relatively moderate climate, spectacular scenery, unique opportunities for wildlife viewing and other nature-based activities that, together with cultural amenities in its urban centres, attract travellers from Canada, the US and beyond. This article examines the characteristics of Canadians who visit BC and selected other provinces, using information from Statistics Canada's *Canadian Travel Survey*.

Pleasure trips are the main reason for travelling to BC

Pleasure trips and trips made to visit friends or relatives represented 72% of all domestic travel by Canadians to BC in 2003. Travelling for pleasure was the most common reason given by those who visited BC, with 7.3 million trips, or 43% of all domestic travel to the province made for that purpose.

Travelling for pleasure more common in BC than in other provinces



Nationally, 39% of trips within Canada were pleasure trips. Visitors to Ontario (41%), Quebec (40%) and Alberta (35%) were less likely to be travelling for pleasure than those who came to BC.

Visiting friends and relatives was also a common reason for coming to the province. This was reported as the purpose of 4.8 million person-trips, or 28% of travel to BC in 2003. Canadians travelling to Quebec were as likely to be coming to visit friends and relatives (40%) as to be travelling for pleasure. In Ontario, 38% of trips were primarily to visit friends and relatives; the ratio in Alberta was just 30%, well below the national average of 36%.

A relatively small percentage of travellers to BC (11%) were on business trips. Alberta had the highest proportion of business travel of any province in 2003, at 13%. The national average was 10%.

There has been little change in the type of travellers coming to BC from other parts of Canada during the last eight years. The trend for pleasure trips has been generally steady, accounting for 43% to 46% of all person-trips to the province. However, business travel has declined slightly. Business trips averaged around 14% of all trips during the late 1990s, but have declined since then.

Within Canada, over the last eight years, there has generally been an upward trend in trips for pleasure, with the percentage of travellers on pleasure trips increasing from 37% to 40% of total trips during this period. As was the case in BC, business travel accounts for a declining share of total trips, with most of the decline occurring during the period since 2001. This could reflect a downturn in the business cycle, as well as a decrease in business travel during the post-9/11 period.

The Canadian domestic tourism industry suffered a difficult year in 2003, although domestic travel was less affected than international travel to Canada. A variety of external factors dampened tourism activities in 2003. Although the SARS outbreak primarily affected international travel to Canada, the forest fire situation during the summer may have led some Canadians to change their plans to travel to BC while the blazes were at their worst, although the extent to which this occurred is unknown. At the same time, a stronger Canadian dollar vis-à-vis the US greenback might have encouraged Canadians to travel south of the border.

Shopping and visiting friends or relatives most popular travel activities

Top BC activities preferred by visitors in 2003 were shopping, sightseeing and visiting friends or relatives. Walking and hiking, followed by visiting provincial and national parks, are more sought-after travel activities in BC than in the rest of Canada. Based on the available data for 2003, the least common travel priorities were wildlife viewing and visiting theme parks.

Visitors pack their credit cards first when travelling to BC

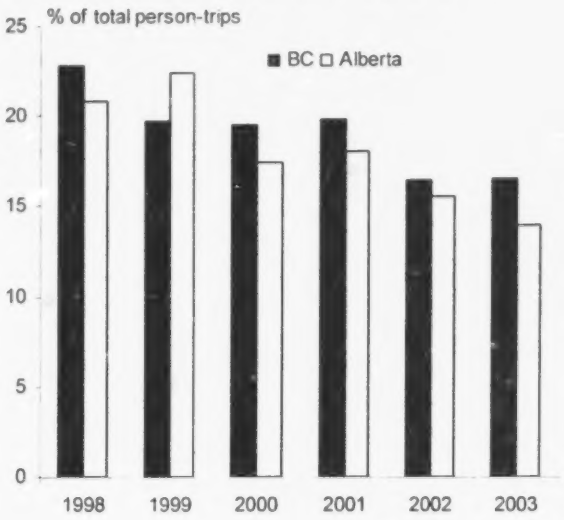
In contrast to BC, in 2003, the majority of visitors within Canada preferred visiting friends and relatives, while shopping and sightseeing ranked second. Hiking, as a holiday activity, does not receive as much attention in the rest of Canada as in BC. Going to nightclubs and bars was the fifth favourite past-time within Canada.

In 2003 snowmobiling and cross-country skiing were not as popular winter past times in other parts of Canada, but downhill skiing did receive more interest from Canadians.

BC's national and provincial parks have high recreational and tourism value

BC is a more popular destination for travellers interested in visiting national and provincial parks than our next-door neighbour Alberta.

BC popular destination for visiting national and provincial parks



In 2003, 2.2 million trips, or close to 17% of visitors to BC took a trip to a national or provincial park, while in Alberta only 1.8 million, or 14% preferred that activity to others. Overall BC has been more successful in the last few years at attracting outdoor enthusiasts. Although Banff National Park,

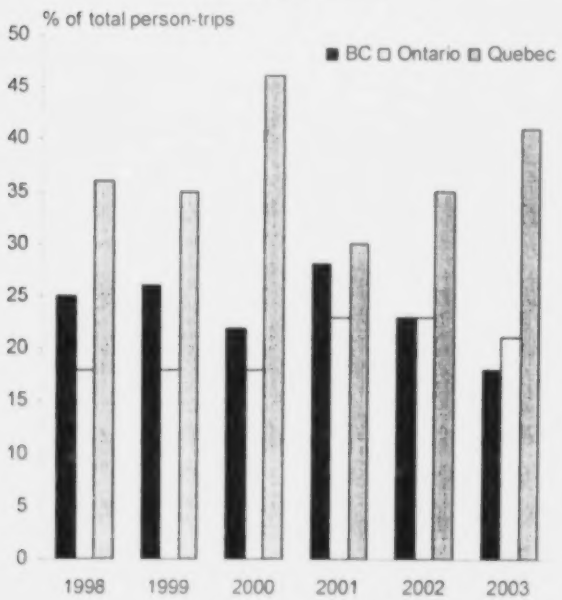
Canada's first national park (founded in 1885), is situated in Alberta, BC's national parks are busier.

In 2003, several shocks to the tourism industry, such as the SARS outbreak, forest fires and floods in the province appear to have disturbed visitors' travel arrangements. There was a substantial drop (-17.3%) in the number of outdoor enthusiasts visiting national and provincial parks in the province. Other provinces, such as Alberta (-26.3%) and Ontario (-20.7%), experienced even steeper declines than BC in 2003.

The domestic skiing industry in BC is losing ground to Quebec

In 2003, ski resorts in BC did not fare nearly as well as in other provinces. Alpine skiers, made an estimated 608 thousand trips, or 4% of all domestic travel made to the province, for that purpose.

The number of Canadian skiers at BC resorts has decreased



This was down 29.2% from the previous year when there were 859 thousand visitors, as lower snow levels and a relatively weaker economy affected the number of visitors to BC ski resorts.

Slopes in Alberta were also less busy (-7.5%) than they were in 2002 mostly due to lack of snow. In 2003, alpine skiers showed a preference for Quebec's ski facilities as the province posted significant gains (+4.6%) from 2002.

Since 2001, when BC was Quebec's strongest competitor, the trend for the province has been downwards, while for Quebec the opposite is true.

Overall, in BC and in Canada as a whole, the domestic travel sector has been losing momentum since 2000. Several factors have contributed to this decline, such as the economic slowdown and the corresponding drop in consumer confidence in 2001, higher gas prices experienced since that time, the SARS outbreak, ongoing airline woes and a much higher value of the Canadian dollar, which may have possibly tempted Canadians to spend their disposable income abroad.

It is difficult to say whether or not 2004 will be a better year in terms of domestic travel, because, although many of the shocks to the tourism sector are behind us, the appreciation of the dollar and the high price of gasoline may still discourage Canadians from travelling within their own country.

Table 1: Room Revenue by Development Region ($000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Jul-03	21,915	64,545	16,980	5,849	3,553	1,557	726	3,881	119,007
Aug-03	22,599	67,315	17,279	5,707	3,540	1,626	726	3,940	122,732
Sep-03	22,455	66,819	16,692	5,736	3,482	1,604	729	3,616	121,132
Oct-03	23,379	67,356	17,834	6,175	3,773	1,602	758	3,756	124,634
Nov-03	23,521	68,444	18,008	5,985	3,668	1,632	715	3,746	125,719
Dec-03	23,854	69,837	19,911	6,475	3,758	1,751	728	4,398	130,713
Jan-04	25,276	68,624	18,671	6,414	3,606	1,686	717	3,866	128,860
Feb-04	23,905	69,351	18,637	6,745	3,672	1,655	721	4,344	129,029
Mar-04	23,628	68,954	18,940	6,216	3,834	1,592	617	4,314	128,096
Apr-04	23,740	73,001	18,593	6,601	3,644	1,672	791	5,063	133,106
May-04	23,546	73,032	18,970	6,169	3,650	1,621	729	3,758	131,473
Jun-04	24,052	73,656	18,702	6,257	3,769	1,674	736	4,005	132,851
Jul-04	24,347	73,046	19,087	6,500	3,767	1,725	727	4,062	133,262
Month-over-month growth rates									
Jul-03	-0.2	2.9	-4.6	-0.5	-1.6	-0.2	2.2	9.6	1.0
Aug-03	3.1	4.3	1.8	-2.4	-0.4	4.4	0.1	1.5	3.1
Sep-03	-0.6	-0.7	-3.4	0.5	-1.6	-1.3	0.3	-8.2	-1.3
Oct-03	4.1	0.8	6.8	7.7	8.3	-0.1	4.1	3.9	2.9
Nov-03	0.6	1.6	1.0	-3.1	-2.8	1.9	-5.7	-0.3	0.9
Dec-03	1.4	2.0	10.6	8.2	2.4	7.3	1.8	17.4	4.0
Jan-04	6.0	-1.7	-6.2	-0.9	-4.0	-3.8	-1.6	-12.1	-1.4
Feb-04	-5.4	1.1	-0.2	5.2	1.8	-1.8	0.6	12.4	0.1
Mar-04	-1.2	-0.6	1.6	-7.8	4.4	-3.8	-14.5	-0.7	-0.7
Apr-04	0.5	5.9	-1.8	6.2	-5.0	5.0	28.3	17.4	3.9
May-04	-0.8	0.0	2.0	-6.5	0.2	-3.1	-7.8	-25.8	-1.2
Jun-04	2.2	0.9	-1.4	1.4	3.3	3.3	0.9	6.6	1.0
Jul-04	1.2	-0.8	2.1	3.9	-0.1	3.1	-1.2	1.4	0.3

July month-over-month percent growth

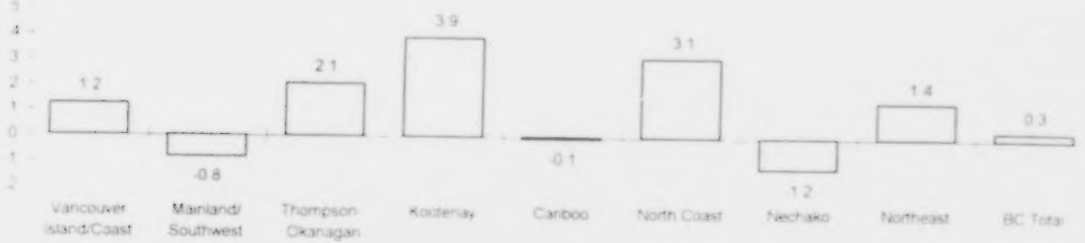


Table 2: Room Revenue by Accommodation Type ($000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			
				Annual data			
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
				Annual growth rates			
1999	5.4	15.3	15.3	12.9	2.2	19.2	12.0
2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
				Monthly data			
Jul-03	34,707	14,378	24,058	14,166	14,553	9,767	7,595
Aug-03	36,824	14,920	24,786	14,566	14,674	9,891	7,611
Sep-03	35,605	14,869	24,535	14,218	13,901	9,490	7,838
Oct-03	36,307	15,427	25,433	14,729	15,808	9,792	7,957
Nov-03	36,165	15,649	25,721	14,584	15,309	10,095	7,652
Dec-03	38,575	15,975	25,464	14,858	16,846	10,581	8,810
Jan-04	36,869	15,832	25,791	15,064	15,737	9,739	8,258
Feb-04	36,821	15,530	25,943	14,748	15,714	9,953	8,054
Mar-04	38,171	16,123	26,068	14,850	15,816	9,423	7,439
Apr-04	39,736	15,660	26,632	15,257	15,670	10,050	8,548
May-04	40,016	16,187	26,772	15,266	15,662	10,306	7,914
Jun-04	39,688	16,548	26,831	15,474	15,903	10,293	8,033
Jul-04	37,634	16,360	27,156	15,694	16,206	10,493	8,428
				Month-over-month growth rates			
Jul-03	3.1	2.4	-0.5	-0.4	-2.7	-0.5	-1.4
Aug-03	6.1	3.8	3.0	2.8	0.8	1.3	0.2
Sep-03	-3.3	-0.3	-1.0	-2.4	-5.3	-4.1	3.0
Oct-03	2.0	3.8	3.7	3.6	13.7	3.2	1.5
Nov-03	-0.4	1.4	1.1	-1.0	-3.2	3.1	-3.8
Dec-03	6.7	2.1	-1.0	1.9	10.0	4.8	15.1
Jan-04	-4.4	-0.9	1.3	1.4	-6.6	-8.0	-6.3
Feb-04	-0.1	-1.9	0.6	-2.1	-0.1	2.2	-2.5
Mar-04	3.7	3.8	0.5	0.7	0.6	-5.3	-7.6
Apr-04	4.1	-2.9	2.2	2.7	-0.9	6.6	14.9
May-04	0.7	3.4	0.5	0.1	-0.1	2.6	-7.4
Jun-04	-0.8	2.2	0.2	1.4	1.5	-0.1	1.5
Jul-04	-5.2	-1.1	1.2	1.4	1.9	1.9	4.9

July month-over-month percent growth

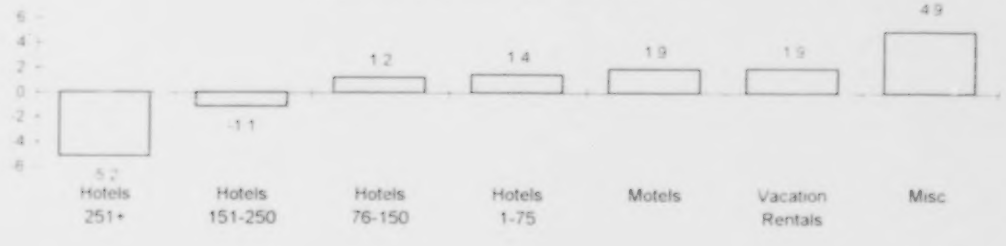


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Jul-04	Revenue ($000) YTD 04	% change from Jul-03	% change from YTD 03	Properties (#) Jul-04	Properties # chg from Jul-03	Rooms (#) Jul-04	Rooms # chg from Jul-03
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	24,293	93,052	13.3	8.9	188	3	8,450	339
Total - Hotels	19,238	76,714	14.2	10.6	71	2	5,688	256
76+ Rooms	14,284	59,229	13.3	12.8	26	1	3,937	236
1-75 Rooms	4,953	17,484	17.1	3.7	45	1	1,751	20
Motels	2,285	7,912	11.4	3.3	29	-1	1,087	7
Vacation Rentals	947	2,811	2.1	-16.0	27	-1	343	5
19 Cowichan Valley								
Total - All accommodation types	1,166	4,730	2.9	5.2	37	1	659	3
Motels	242	1,092	6.9	12.3	16	1	315	19
21 Nanaimo								
Total - All accommodation types	5,843	21,333	14.5	7.0	75	0	2,607	-183
Total - Hotels	2,600	10,937	15.2	8.9	19	-1	1,224	-191
Motels	1,202	4,290	12.4	6.8	23	0	625	7
Vacation Rentals	1,769	5,067	19.1	5.1	22	0	601	-3
23 Alberni-Clayoquot								
Total - All accommodation types	6,387	20,156	12.0	10.0	67	5	1,489	43
Total - Hotels	1,470	5,287	15.6	15.7	12	1	410	-12
Motels	706	2,017	-0.6	0.4	20	-1	405	-10
Vacation Rentals	2,294	7,044	28.2	11.2	15	4	332	63
25 Comox-Strathcona								
Total - All accommodation types	4,694	17,160	8.3	6.2	89	0	2,094	-37
Fishing lodges	1,271	2,693	13.3	9.2	25	1	411	5
Motels	955	4,256	5.1	8.7	23	-2	626	-57
Vacation Rentals	719	2,126	5.1	5.4	23	0	288	6
27 Powell River								
Total - All accommodation types	602	2,791	48.1	52.6	19	1	395	2
43 Mount Waddington								
Total - All accommodation types	953	2,812	4.8	-2.6	27	-2	712	-32
45 Central Coast								
Total - All accommodation types	292	980	-4.1	-1.6	12	-1	160	-7
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	4,340	21,219	16.0	8.1	84	-2	2,412	-71
Total - Hotels	2,910	15,230	17.7	7.7	19	-3	1,354	-94
Motels	1,109	4,260	15.1	11.3	36	1	917	19
15 Greater Vancouver								
Total - All accommodation types	79,342	364,996	13.2	13.1	248	-7	27,357	-77
Total - Hotels	73,178	344,113	12.9	13.5	159	-5	23,336	-111
251+ Rooms	38,976	190,087	14.4	14.4	25	0	9,956	0
151-250 Rooms	14,114	65,013	11.8	12.2	25	0	4,752	-1
76-150 Rooms	14,769	66,532	11.1	12.3	55	1	5,968	142
1-75 Rooms	5,319	22,480	10.4	13.4	54	-6	2,640	-252
Motels	2,516	9,656	18.2	5.9	36	-1	1,596	-15
Vacation Rentals	1,129	4,826	17.6	13.0	19	1	587	51
29 Sunshine Coast								
Total - All accommodation types	677	2,235	16.7	11.3	23	1	374	0
31 Squamish-Lillooet								
Total - All accommodation types	12,237	127,020	4.1	-8.9	102	5	7,728	627
Total - Hotels	10,222	102,267	2.0	-7.6	47	4	5,975	592
151+ Rooms	6,653	67,462	-5.1	-9.7	12	2	3,701	548
76-150 Rooms	2,744	26,218	20.2	-2.8	15	0	1,519	0
1-75 Rooms	825	8,587	12.6	-4.3	20	2	755	44
Vacation Rentals	1,164	17,393	14.6	-13.1	28	2	1,228	50
Miscellaneous	582	6,304	25.0	-17.4	18	-1	308	-15
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	8,766	21,752	8.8	7.2	119	-2	3,267	-130
Total - Hotels	3,670	11,075	6.1	5.7	16	-1	1,083	-101
Motels	4,105	8,462	10.6	9.8	79	-4	1,842	-34
Vacation Rentals	635	1,579	-9.7	-1.6	15	1	263	2

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000)		Revenue % change from		Properties (#)	Properties # chg from	Rooms (#)	Rooms # chg from
	Jul-04	YTD 04	Jul-03	YTD 03	Jul-04	Jul-03	Jul-04	Jul-03
33 Thompson-Nicola								
Total - All accommodation types	8,674	38,730	18.2	15.0	174	-6	5,729	-3
Fishing lodges	324	797	-12.7	-5.1	16	-1	177	-8
Total - Hotels	4,007	17,641	28.3	20.5	37	1	2,272	46
1-75 Rooms	954	3,516	17.2	9.8	25	1	883	46
Motels	3,253	11,256	24.3	18.7	77	0	2,301	13
Vacation Rentals	409	6,503	-26.0	4.9	25	-3	605	-20
Miscellaneous	681	2,533	1.1	0.7	19	-3	374	-34
35 Central Okanagan								
Total - All accommodation types	10,538	39,703	14.8	6.4	70	0	3,696	-20
Total - Hotels	6,206	25,998	14.6	6.6	18	-1	1,706	-52
Motels	2,695	7,548	16.4	5.9	29	1	1,159	6
Vacation Rentals	970	4,911	11.4	5.5	19	1	430	38
37 North Okanagan								
Total - All accommodation types	2,536	11,838	19.7	0.4	51	0	1,669	52
Total - Hotels	1,216	7,045	28.4	-5.1	12	0	775	0
Motels	997	3,432	44.3	32.4	19	0	639	94
39 Columbia-Shuswap								
Total - All accommodation types	6,983	21,545	13.1	8.6	110	-3	3,292	-39
Total - Hotels	3,000	9,267	14.5	12.9	19	-1	1,224	-15
Motels	2,469	7,460	7.9	8.9	49	1	1,528	11
Vacation Rentals	899	1,555	0.7	-0.1	14	-2	176	-35
Kootenay								
01 East Kootenay								
Total - All accommodation types	6,195	33,235	8.0	7.6	112	-3	4,461	38
Total - Hotels	1,821	10,376	10.7	4.0	26	-1	1,469	30
Motels	1,663	6,144	3.6	3.8	49	-4	1,163	-83
Vacation Rentals	1,008	8,111	0.3	21.4	16	1	934	81
03 Central Kootenay								
Total - All accommodation types	2,704	10,363	17.3	8.6	84	1	1,637	31
Total - Hotels	1,366	5,628	17.3	10.1	18	2	769	62
Motels	731	2,487	11.0	0.7	30	-4	533	-61
Vacation Rentals	309	764	19.8	16.9	21	0	164	0
05 Kootenay Boundary								
Total - All accommodation types	748	3,558	24.3	6.3	35	0	666	2
Motels	493	1,823	21.6	7.5	22	0	370	2
Cariboo								
41 Cariboo								
Total - All accommodation types	2,428	9,345	2.6	3.3	116	-7	2,187	-93
Fishing lodges	151	380	-9.1	-7.0	17	-4	152	-39
Motels	1,103	4,867	1.5	3.8	37	-1	1,007	-89
Vacation Rentals	271	547	-3.2	-0.9	34	-3	335	31
Miscellaneous	232	784	-5.6	-2.8	17	1	169	4
53 Fraser-Fort George								
Total - All accommodation types	3,023	15,801	7.9	4.8	57	0	2,684	2
Total - Hotels	1,967	11,182	4.2	4.9	18	0	1,392	0
Motels	911	3,938	15.5	4.9	28	0	967	2
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	2,419	6,969	4.1	3.5	42	1	1,183	14
Fishing lodges	973	1,903	1.8	-4.6	12	1	177	10
49 Kitimat-Stikine								
Total - All accommodation types	1,028	4,688	31.8	10.5	37	6	837	76
Motels	384	1,691	44.0	4.2	16	3	379	57
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	1,046	4,601	-1.1	-3.0	57	-3	1,180	-107
Fishing lodges	82	233	18.2	6.7	12	-1	82	4
Motels	560	2,602	-7.8	-5.7	24	-2	625	-60
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	3,896	31,323	3.6	9.8	71	5	3,457	787
Total - Hotels	2,033	14,494	17.3	22.9	21	2	1,504	168
Motels	1,149	6,803	1.1	8.8	34	1	932	23

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	($000)		% change from		(#)	# chg from	(#)	# chg from
	Jul-04	YTD 04	Jul-03	YTD 03	Jul-04	Jul-03	Jul-04	Jul-03
Vancouver Island/Coast	**44,230**	**163,013**	**12.4**	**8.6**	**514**	**7**	**16,566**	**128**
Victoria (C)	18,686	74,512	13.2	10.3	87	0	5,729	207
Other CRD	5,607	18,540	13.3	3.3	101	3	2,721	132
Nanaimo (C)	2,381	11,202	13.6	7.5	22	0	1,206	0
Port Alberni (C)	538	2,021	20.4	10.3	15	2	380	-10
Courtenay (C)	969	4,835	-	-	10	1	422	4
Rest of Development Region	16,049	51,903	-	-	289	2	6,108	-205
Mainland/Southwest	**96,536**	**515,471**	**12.1**	**6.6**	**434**	**-3**	**37,871**	**479**
Downtown Vancouver (C)	50,779	234,843	13.7	15.4	84	-4	12,931	-111
Other Vancouver (C)	4,303	17,963	5.3	6.1	37	-6	2,680	-127
Richmond (C)	11,712	56,120	13.4	11.4	25	0	4,337	0
Burnaby (C)	3,117	15,512	9.5	9.7	12	0	1,635	357
Other GVRD	9,431	40,558	15.9	7.8	87	3	5,774	161
Whistler (DM)	11,375	123,011	3.4	-9.0	76	4	7,114	604
Rest of Development Region	5,879	27,464	15.7	6.3	113	0	3,400	-405
Thompson/Okanagan	**37,497**	**133,569**	**14.1**	**8.7**	**524**	**-11**	**17,653**	**-140**
Penticton (C)	4,791	12,894	10.6	8.0	53	1	1,820	-105
Kamloops (C)	6,135	30,210	25.9	18.8	73	-1	3,742	75
Kelowna (C)	8,858	35,694	19.1	6.2	51	2	2,977	-1
Vernon (C)	2,137	11,091	21.2	-0.0	30	0	1,443	52
Revelstoke (C)	2,359	8,518	18.3	6.7	30	-2	1,216	-62
Rest of Development Region	13,216	35,161	6.1	7.1	287	-11	6,455	-99
Kootenay	**9,647**	**47,157**	**11.6**	**7.7**	**231**	**-2**	**6,764**	**71**
Cranbrook (C)	1,103	4,428	9.9	6.0	17	0	787	-7
Nelson (C)	910	3,745	12.6	8.5	13	1	429	2
Rest of Development Region	7,634	38,984	11.7	7.8	214	-2	5,977	78
Cariboo	**5,452**	**25,146**	**5.5**	**4.2**	**173**	**-7**	**4,871**	**-91**
Quesnel (C)	453	2,044	4.6	7.6	13	0	452	0
Williams Lake (C)	573	2,588	9.6	0.9	11	-1	519	-89
Prince George (C)	1,966	11,792	4.7	4.0	30	1	1,926	6
Rest of Development Region	2,459	8,722	5.3	4.8	119	-7	1,974	-8
North Coast	**3,447**	**11,657**	**11.1**	**6.2**	**79**	**7**	**2,000**	**90**
Prince Rupert (C)	1,033	3,981	1.4	3.7	16	0	773	0
Terrace (C)	536	2,688	24.7	10.0	14	3	433	45
Rest of Development Region	1,878	4,989	13.5	6.2	49	4	794	45
Nechako	**1,046**	**4,601**	**-1.1**	**-3.0**	**57**	**-3**	**1,180**	**-107**
Smithers (T)	473	2,141	9.4	1.2	15	1	449	24
Rest of Development Region	573	2,460	-8.4	-6.3	42	-4	731	306
Northeast	**3,896**	**31,323**	**3.6**	**9.8**	**71**	**5**	**3,457**	**787**
Dawson Creek (C)	678	3,816	14.6	22.7	13	-1	484	-11
Fort St. John (C)	1,667	12,834	6.2	14.4	22	2	1,630	128
Rest of Development Region	1,551	14,673	-3.0	3.4	36	4	1,343	670

"-" Data for regions with fewer than 10 properties reporting can not be released

Table 5: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Jul-03	39,350	86,148	32,863	8,643	5,169	3,103	1,058	3,762	180,097
Aug-03	47,004	101,199	37,026	9,969	5,569	3,107	1,142	3,978	208,993
Sep-03	31,458	72,552	20,022	6,662	4,774	2,338	1,091	3,536	142,433
Oct-03	19,909	52,270	13,801	4,244	3,775	1,207	963	3,455	99,623
Nov-03	12,753	41,418	8,039	2,484	2,622	903	538	2,967	71,724
Dec-03	11,763	59,336	11,652	5,024	2,199	831	454	3,803	95,060
Jan-04	10,891	59,530	12,523	5,875	2,276	791	415	4,428	96,729
Feb-04	14,125	68,452	15,086	8,185	2,450	1,033	459	6,323	116,112
Mar-04	17,288	74,357	15,792	7,768	3,224	1,040	507	6,565	126,540
Apr-04	19,496	63,491	12,696	5,004	3,223	1,056	545	4,482	109,993
May-04	25,608	71,425	18,051	4,761	3,831	1,504	652	2,397	128,230
Jun-04	31,375	81,620	21,926	5,917	4,691	2,786	975	3,231	152,522
Jul-04	44,230	96,596	37,497	9,647	5,452	3,447	1,040	3,896	201,810
Year-over-year percent changes									
Jul-03	-0.6	-10.2	1.7	3.0	-0.5	0.3	0.4	38.1	-4.3
Aug-03	2.5	-3.6	-1.0	-8.9	-6.7	2.7	3.3	31.1	-1.6
Sep-03	2.5	-3.8	-4.5	-7.5	-7.4	-0.6	-1.1	4.5	-2.6
Oct-03	7.0	-5.8	3.1	7.1	1.4	5.2	-6.5	8.4	-0.9
Nov-03	7.1	-0.9	7.6	0.0	-0.5	4.4	-8.1	18.7	2.1
Dec-03	4.6	0.0	12.7	13.6	6.6	27.1	3.0	70.9	4.8
Jan-04	13.9	-4.4	3.3	8.0	1.1	8.0	-6.0	10.5	-0.1
Feb-04	9.7	-5.5	11.6	12.1	8.4	6.9	-14.0	24.7	1.0
Mar-04	3.8	1.4	7.0	0.3	7.8	-7.2	-15.9	-4.2	2.0
Apr-04	5.9	14.1	6.7	15.2	1.0	5.0	7.0	28.3	11.7
May-04	4.7	11.4	10.5	1.7	1.3	4.3	-2.1	-2.2	8.7
Jun-04	9.0	17.0	2.4	5.0	4.6	6.8	5.1	12.0	11.8
Jul-04	12.4	12.1	14.1	11.6	5.5	11.1	-1.1	3.6	12.1

July year-over-year percent change

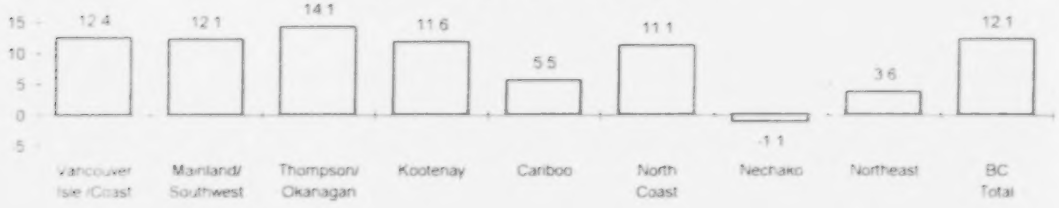


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International						
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**
Annual data								
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,960.1	6,583.2	2,808.1	3,787.8	1,376.9	764.0	411.8	118.0
2003	7,327.4	6,124.8	2,580.7	3,556.7	1,202.6	577.6	410.1	124.8
Annual percent changes								
1999	5.4	4.8	7.9	2.0	8.6	9.7	7.8	6.6
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.2	-4.5	-13.8	4.2	-2.9	4.4	-11.7	-10.5
2003	-7.9	-7.0	-8.1	-6.1	-12.7	-24.4	-0.4	5.8
Monthly data								
Aug-03	624.0	522.0	216.8	304.8	102.0	50.7	33.5	10.6
Sep-03	618.1	515.2	216.2	299.3	102.9	50.9	33.5	11.2
Oct-03	613.5	508.7	217.2	295.3	104.8	57.3	33.6	9.7
Nov-03	607.7	502.2	211.2	290.9	105.5	55.3	34.2	10.2
Dec-03	613.0	504.9	209.7	292.6	108.1	55.4	34.3	11.1
Jan-04	597.4	488.2	204.9	285.6	109.3	55.7	34.3	11.7
Feb-04	600.8	490.0	206.8	286.7	110.9	55.5	35.1	10.9
Mar-04	613.2	505.8	210.5	298.7	107.4	57.2	35.0	9.3
Apr-04	627.8	510.5	210.6	300.7	117.4	61.4	35.3	11.7
May-04	625.9	502.8	205.3	299.4	123.1	63.1	37.7	13.0
Jun-04	633.2	509.2	211.1	296.6	124.1	65.0	37.8	12.8
Jul-04	627.1	506.7	210.4	295.2	120.4	58.1	41.1	12.8
Aug-04	602.6	487.5	201.2	286.9	115.1	53.2	37.0	12.7
Month-over-month growth rates								
Aug-03	2.7	2.0	3.2	3.4	6.5	15.6	4.0	4.0
Sep-03	-0.9	-1.3	-0.3	-1.8	0.9	0.4	-0.1	6.2
Oct-03	-0.7	-1.3	0.5	-1.3	1.8	12.6	0.4	-13.9
Nov-03	-1.0	-1.3	-2.8	-1.5	0.7	-3.5	1.8	5.4
Dec-03	0.9	0.5	-0.7	0.6	2.5	0.2	0.2	9.2
Jan-04	-2.5	-3.3	-2.3	-2.4	1.1	0.5	-0.2	5.3
Feb-04	0.6	0.4	0.9	0.4	1.5	-0.4	2.5	-7.2
Mar-04	2.1	3.2	1.8	4.2	-3.1	3.2	-0.3	-14.7
Apr-04	2.4	0.9	0.0	0.7	9.3	7.2	0.9	26.0
May-04	-0.3	-1.5	-2.5	-0.5	4.9	2.9	6.8	11.4
Jun-04	1.2	1.3	2.8	-0.9	0.8	3.0	0.3	-1.5
Jul-04	-1.0	-0.5	-0.3	-0.4	-3.0	-10.6	8.7	-0.2
Aug-04	-3.9	-3.8	-4.4	-2.8	-4.4	-8.4	-10.0	-1.2

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquihalla Hwy
	Total	Domestic	Trans-border	Other Int'l.	Total	Vehicles	Passengers	Passenger Vehicles
Annual data								
1999	15,806	8,314	4,120	3,372	1,191	7,852	21,369	2,388
2000	16,033	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,869	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,103	8,272	21,540	2,530
2003	14,322	7,266	3,814	3,241	1,183	8,263	21,348	2,480
Annual growth rates								
1999	1.9	1.2	-0.1	6.4	-1.9	0.4	-0.2	0.5
2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
Monthly data								
Aug-03	1,226	617	334	275	103	702	1,823	202
Sep-03	1,222	619	321	283	103	697	1,792	196
Oct-03	1,230	624	318	288	105	695	1,785	218
Nov-03	1,257	631	325	301	104	690	1,768	197
Dec-03	1,270	645	325	300	106	645	1,683	209
Jan-04	1,254	633	321	299	104	678	1,748	196
Feb-04	1,283	663	328	293	106	708	1,815	213
Mar-04	1,277	650	329	298	102	716	1,839	222
Apr-04	1,305	653	339	312	104	712	1,858	221
May-04	1,314	657	331	327	103	701	1,817	215
Jun-04	1,320	666	323	331	103	701	1,808	213
Jul-04	1,307	666	318	322	103	705	1,814	217
Aug-04	1,289	653	323	313	100	693	1,778	206
Month-over-month growth rates								
Aug-03	3.8	2.7	3.0	7.3	3.6	1.2	2.3	-3.1
Sep-03	-0.3	0.3	-3.9	2.7	0.0	-0.8	-1.7	-2.9
Oct-03	0.7	0.9	-1.0	2.1	2.4	-0.3	-0.4	11.0
Nov-03	2.2	1.0	2.3	4.5	-1.0	-0.7	-0.9	-9.7
Dec-03	1.0	2.3	-0.1	-0.4	2.0	-6.5	-4.8	6.4
Jan-04	-1.3	-1.9	-1.0	-0.2	-1.8	5.1	3.9	-6.4
Feb-04	2.4	4.7	2.0	-2.1	1.3	4.5	3.8	8.7
Mar-04	-0.5	-1.9	0.3	1.7	-3.2	1.1	1.3	4.2
Apr-04	2.2	0.5	3.3	4.7	2.2	-0.6	1.0	-0.5
May-04	0.8	0.6	-2.5	4.7	-1.7	-1.5	-2.2	-2.9
Jun-04	0.4	1.5	-2.4	1.2	0.5	0.1	-0.5	-0.9
Jul-04	-1.0	0.0	-1.4	-2.6	0.2	0.5	0.3	2.0
Aug-04	-1.3	-2.0	1.4	-2.7	-2.9	-1.6	-2.0	-5.1

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry[2]		Consumer Price Index[1]	
	Total tourism related	Air transport[4]	Accom-modation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%)[3]	Room Rate ($)	Traveller accom-modation	Restaurant food[4]
Annual data									
1999	181.7	15.3	29.2	110.1	27.1	61.7	112.03	133.1	115.6
2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	116.99	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.76	111.8	127.6
Annual Growth Rates									
1999	-1.5	-3.6	-0.5	0.4	-8.5	-0.2	3.1	2.4	1.5
2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.6	0.7	-6.9	3.4
2003	1.1	4.4	-0.7	-0.3	6.8	-1.1	-2.8	-9.9	1.8
Monthly data									
Aug-03	193.1	12.5	29.3	117.8	33.5	59.6	112.80	109.1	128.1
Sep-03	189.8	12.6	29.2	115.1	32.8	57.8	113.70	106.9	128.2
Oct-03	189.2	12.7	28.7	116.0	31.8	59.7	114.40	108.6	128.3
Nov-03	192.5	12.6	28.4	118.4	33.2	60.4	113.80	108.1	128.7
Dec-03	193.8	12.3	28.3	120.0	33.2	60.6	114.70	106.8	128.6
Jan-04	194.7	12.7	27.7	120.5	33.8	60.2	114.00	104.3	128.9
Feb-04	191.8	12.9	27.6	117.8	33.5	59.2	113.40	103.1	129.0
Mar-04	193.6	12.7	27.6	118.3	35.1	61.1	113.60	102.9	129.2
Apr-04	192.5	12.7	27.7	117.6	34.5	62.0	115.90	102.6	129.7
May-04	192.3	12.8	28.3	117.0	34.3	61.6	115.70	102.2	129.8
Jun-04	192.6	13.0	28.1	117.2	34.3	62.2	115.50	101.9	129.8
Jul-04	192.4	13.0	27.7	117.1	34.6	61.2	115.20	101.1	129.8
Aug-04	194.0	13.2	27.5	117.7	35.6	59.1	115.50	99.9	129.6
Month-over-month growth rates									
Aug-03	-0.3	-2.1	1.7	-0.4	-0.9	2.8	0.1	0.4	0.3
Sep-03	-1.7	1.0	-0.5	-2.3	-1.9	-1.8	0.8	-2.0	0.1
Oct-03	-0.3	0.5	-1.6	0.8	-3.1	1.9	0.6	1.6	0.1
Nov-03	1.8	-0.3	-1.2	2.0	4.3	0.7	-0.5	-0.5	0.3
Dec-03	0.7	-2.4	-0.3	1.4	0.1	0.2	0.8	-1.2	-0.1
Jan-04	0.5	3.5	-2.2	0.4	1.6	-0.4	-0.6	-2.3	0.2
Feb-04	-1.5	1.5	-0.3	-2.2	-0.9	-1.0	-0.5	-1.2	0.1
Mar-04	0.9	-1.7	-0.1	0.4	4.8	1.9	0.2	-0.2	0.2
Apr-04	-0.6	-0.2	0.6	-0.6	-1.7	0.9	2.0	-0.3	0.4
May-04	-0.1	0.6	2.0	-0.5	-0.5	-0.4	-0.2	-0.4	0.1
Jun-04	0.1	1.7	-0.6	0.2	0.1	0.6	-0.2	-0.3	0.0
Jul-04	-0.1	-0.2	-1.5	-0.1	0.8	-1.0	-0.3	-0.8	0.0
Aug-04	0.9	1.9	-0.8	0.5	3.0	-2.1	0.3	-1.2	-0.2

[1]Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

[2]Source: Pannell Kerr Forster and BC Stats

[3]Occupancy Rate change expressed as percentage point change

[4] No identifiable seasonality

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns [1]					
	Receipts ($ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
Annual data						
1999	4,467.5	369.8	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
2003	5,388.8	284.4	5,104.3	33,648.9	2,089.1	31,559.8
Annual growth rates						
1999	-3.7	-7.3	-3.4	4.3	12.9	3.6
2000	8.1	-2.9	9.1	7.5	8.4	7.4
2001	7.1	-0.3	7.7	6.6	3.2	6.8
2002	-1.5	-14.6	-0.5	2.8	-1.7	3.1
2003	5.6	-7.0	6.4	1.6	-6.8	2.2
Monthly data						
Apr-03	427	24	403	2,722	178	2,544
May-03	430	24	406	2,774	173	2,602
Jun-03	430	24	406	2,778	175	2,603
Jul-03	451	24	427	2,794	181	2,612
Aug-03	460	24	436	2,820	174	2,646
Sep-03	464	23	441	2,828	168	2,660
Oct-03	470	22	448	2,866	168	2,698
Nov-03	477	23	454	2,887	169	2,717
Dec-03	478	24	454	2,882	167	2,715
Jan-04	479	22	456	2,869	158	2,711
Feb-04	485	23	463	2,923	166	2,757
Mar-04	498	23	475	2,941	169	2,771
Apr-04	518	24	494	2,949	167	2,781
Month-over-month growth rates						
Apr-03	-0.5	3.8	-0.8	-1.5	0.6	-1.6
May-03	0.6	-3.0	0.8	1.9	-3.1	2.3
Jun-03	0.1	1.4	0.0	0.1	1.3	0.0
Jul-03	5.0	1.3	5.2	0.6	3.5	0.4
Aug-03	2.0	-1.1	2.2	0.9	-3.9	1.3
Sep-03	0.7	-6.1	1.1	0.3	-3.6	0.5
Oct-03	1.4	-1.8	1.5	1.4	0.3	1.4
Nov-03	1.5	2.3	1.4	0.7	0.5	0.7
Dec-03	0.2	4.7	-0.1	-0.2	-1.4	-0.1
Jan-04	0.2	-5.5	0.5	-0.5	-5.4	-0.2
Feb-04	1.4	1.2	1.4	1.9	5.3	1.7
Mar-04	2.5	1.3	2.6	0.6	1.9	0.5
Apr-04	4.1	5.9	4.0	0.3	-1.3	0.4

[1]Source: Statistics Canada & BC Stats

BRITISH COLUMBIA

BC STATS

Ministry of
Management Services

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Tourism Sector Monitor ◆ November 2004

Room Revenue

Room revenues dropped in August (-3.3%, *seasonally adjusted*), ending two months of recovery. Revenues fell in all development regions except Cariboo (+1.4%). The deepest declines were in Thompson-Okanagan (-4.7%), Kootenay (-4.7%), Northeast (-4.3%) and the largest region, Mainland-Southwest (-4.0%). The second largest region, Vancouver Island/Coast (-0.7%), posted more moderate declines.

Room revenues down in August

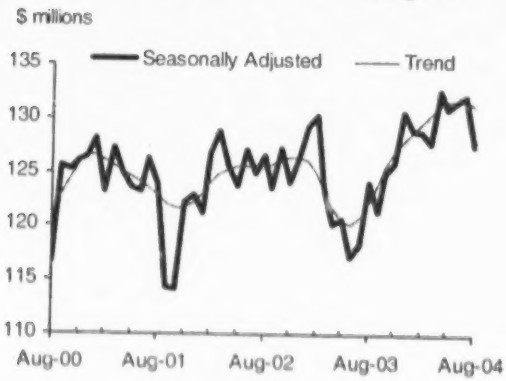


Table 1. Room Revenue
(seasonally adjusted)

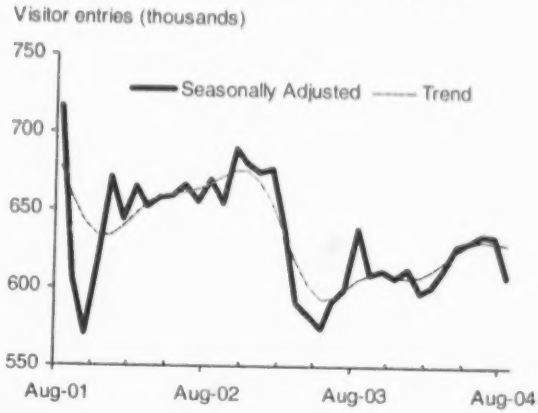
Accommodation Type	Aug 04 ($000)	July 04 ($000)	% change
Total	127,683	132,107	-3.3
Hotels	93,964	96,195	-2.3
Motels	15,373	16,173	-4.9
Other Acc.	18,521	18,885	-1.9
Regions (Top 3 performers)			
Cariboo	3,834	3,780	+1.4
Vancouver Island/Coast	24,135	24,317	-0.7
North Coast	1,687	1,720	-1.9

The sharp decline was due to loss of revenue for every type of tourism establishment. Motels (–4.9%) and smaller hotels (75 rooms or less) (-2.9%) experienced the largest decrease in revenue. Revenues at large hotels (251 or more rooms) (-2.2%) slumped in August.

Visitor Entries

The number of visitors entering Canada via BC border crossings continued to decline in August, falling 2.8% (*seasonally adjusted*). This was due to fewer entries from both the US (-2.5%) and overseas (-4.3%). Possible concerns about delays due to increased security and rising oil prices, as well as a stronger Canadian dollar might have influenced visitors, as the number of American travellers making same-day trips to BC decreased (-4.0%). With the exception of Hong Kong (+14.9%), travel was down for most of BC's top overseas markets.

Visitor entries declined in August



The number of Canadians returning to BC edged up (+0.6%) for the first time since March. Fewer Canadians (-1.7%) made same-day car trips south of the border,

however travel to overseas destinations was more popular (+4.1%).

Table 2. Traveller Entries
(seasonally adjusted)

	Aug-04 ('000)	Jul-04 ('000)	% chg from Jul-04
American visitors			
Total	498	511	-2.5
Same-day	203	211	-4.0
Overnight	293	299	-2.0
Overseas visitors			
Total	115	121	-4.3
Europe	38	40	-7.0
UK	19	20	-4.0
Asia	53	58	-7.7
Japan	18	21	-13.5
Taiwan	6	7	-11.4
Oceania	13	13	-1.2

(BC STATS & Statistics Canada)

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

In the hotel industry, both average room rates (-0.2%) and hotel occupancy (-2.4 percentage points) dropped in August.

Employment in key tourism-related industries picked up speed (+0.8%) in August, with the exception of the accommodation sector (-1.1%) where employment was down from the previous month. The job gains were widespread across the tourism sector, with a notable (+3.0%) increase in the arts, entertainment and recreation industry.

The consumer price indexes for both traveller accommodation (-1.2%) and restaurant food (-0.1%) fell.

Transportation indicators were weak for the second consecutive month. The number of passengers at both the Vancouver (-1.3%) and Victoria (-4.7%) airports was down. In Vancouver, there were more people travelling to or from the US (+2.2%), but fewer overseas passengers (-2.7%). After a month of relatively strong passenger vehicle traffic, the number of cars on the Coquihalla Highway dropped (-4.7%). Passenger volume (-1.7%) and vehicles (-1.5%) aboard BC Ferries were also down.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Aug-04	Change from Jul-04
Hotel Industry		
Occupancy rate	59.0	-2.4 pp.
Average room charge	115.70	-0.2%
(Pannell Kerr Forster)		
Airport Passengers	**(000s)**	**(%)**
Vancouver International Airport		
Total traffic	1,298	-1.3
US (trans-border)	327	2.2
Other International	315	-2.7
Canada (domestic)	656	-2.4
(YVR)		
Victoria International Airport		
Total traffic	100	-4.7
(Victoria Airport Authority)		
Transportation	**(000s)**	**(%)**
Coquihalla Highway		
Passenger Vehicles	207	-4.7
(Ministry of Transportation & Highways)		
BC Ferries		
Vehicle Volume	695	-1.5
Passenger Volume	1,786	-1.7
(BC Ferries)		
Exchange Rates	**Cdn $**	
US $	0.762	0.01
UK Pound	0.419	0.01
Japanese Yen	83.998	1.15
Australian $	1.071	0.02
(Statistics Canada)		

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are now reported on a **seasonally adjusted** basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues rebounded (+4.7%, *seasonally adjusted*) in September, regaining the ground lost in August. All regions fared well except for Cariboo (-0.9%) and North Coast (-2.9%). Mainland/Southwest (+5.9%) was the main engine for revenue growth, followed by Thompson-Okanagan (+5.2%) and Kootenay (+5.7%). The improvement in September was due to strong revenues reported by every type of establishment, with the largest hotels (251 or more rooms) (+6.7%) taking the lead.

Visitor entries posted a strong monthly expansion (+5.0%) in September. Same-day and overnight travellers from the US increased (+5.6%). Asia (+5.2%) and Europe (+4.6%) showed the most notable jumps in overseas visitors to in BC.

The number of passengers increased for all mediums of transportation. Victoria airport (+9.0%) and Coquihalla Highway (+6.6%) was the busiest. Overall, the preliminary indications are that September was a relatively strong month for tourism BC.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

Special Focus: China a potential market for BC's tourism industry

China's travel and tourism industry has been developing rapidly since 1978, when Deng Xiaoping first set the country on a path of economic reforms and policy changes. In the last five years, increasingly favourable and flexible governmental tourism policies have opened up the Chinese tourism industry to the world and enabled more Chinese nationals to step out of their country.

Due to higher living standards and relaxation of travel constraints, more and more Chinese mainlanders are travelling abroad. According to the World Tourism Organization, (WTO) by 2020 China will be the world's fourth-biggest source of outbound tourists after Germany, Japan and the US, and also the biggest destination for international tourists.

The Chinese state media reported 16.6 million outbound tourists in 2002, exceeding Japan for the first time as Asia's largest source of outbound travellers. While it took the Japanese four decades to reach close to 18 million outbound travellers (in 2000), Chinese international travellers accomplished that in one decade. Despite the SARS outbreak, 20.2 million Chinese nationals travelled abroad in 2003, a 21% increase from the previous year.

Canada is not as well placed as other countries to capitalise on the fastest growing tourism market.

Chinese mainlanders' freedom of movement has lagged behind the age of easy international travel by a couple of decades, but they are catching up fast. The big boost has come in the past couple of years, as Chinese authorities have made it easier for individuals to obtain passports. Chinese citizens are also able to obtain tourist visas from countries granted Approved Destination Status (ADS) by Chinese authorities. A country must have ADS before Chinese tour groups are allowed to visit. Chinese travellers wishing to visit countries without ADS must go through a complicated process, which usually means applying for tourist visas that are rarely granted. By February 2004, China had signed ADS agreements with 28 countries and regions and on September 1 2004, 27 European countries were awarded ADS.

The US and Canada are potentially the largest Western markets for Chinese tourists, but the lack of approved status has posed a serious barrier, as have visa-issuing procedures at Embassies in Beijing.

What particularly worries the Canadian and US governments is the prospect of large numbers of Chinese tourists turning up in tour parties and then claiming refugee status. The worry is a legitimate one, however it seems that China and Europe, which are equally keen to avoid refugee issues, have added a clause in the agreement which allows for repatriation of any visitors that would outstay the term of their visit.

The approval of Canada as an official destination would have a significant impact on the Canadian tourism industry, not just because of the sheer number of potential new tourists, but also because of expected expenditure by Chinese tourists. According to European research groups, Chinese tourists spend less per trip than Americans and Japanese, but their spending is on par with that of Germans travelling in Europe. In 2000, Chinese tourists spent an average of $112 per night in Canada, more than visitors from Hong Kong ($102) and Taiwan ($108).

Another major obstacle standing between Canadians and Chinese tourist dollars is the

lack of airline capacity. At present, the air service agreement between the two countries only allows 15 flights a week in each direction.

Newly affluent Chinese travellers would like to visit North America, but where they actually go is Hong Kong, because it is considered a shoppers heaven and also because by 1999, the region had been granted Approved Destination Status. According to Chinese statistical data, Hong Kong is the most popular destination among mainlanders travelling for business and pleasure, followed by Macao and Japan. Among the top 10 preferred countries and regions the US is placed seventh while Australia is tenth.

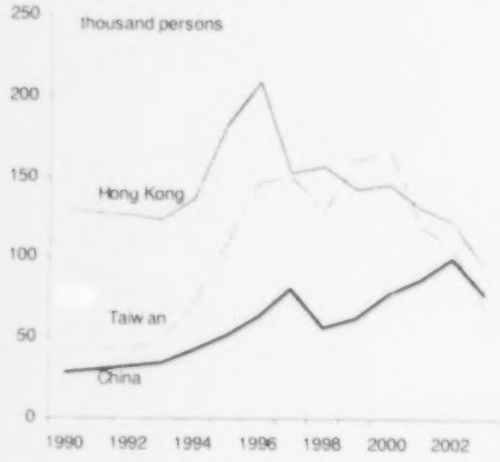
Since receiving ADS in 1999, China has become Australia's fifth biggest international tourist market, after Japan, the UK, the US and Singapore. In 2001, Australia received 172 thousand Chinese visitors, and by 2005 arrivals are expected to reach close to half a million tourists.

In 2003, Canada was not among the top 10 destinations visited by Chinese tourists, although according to the Asia Pacific Foundation of Canada, research has shown that Canada is a highly desirable tourist destination for Chinese travellers, in part due to the large and growing Chinese Canadian population in the country.

Chinese visitors a lucrative business for Canada

Although Canada has not yet been granted ADS by the Chinese government, it still received 86,407 entries from the Mainland in 2001 – half the Australian total. Surveys from 2002 found that 1.9 million newly affluent Chinese would have been interested in visiting Canada, which could have boosted the economy by approximately $1 billion each year. However, administrative barriers from both governments have kept the number of Chinese tourist arrivals low. Very few mainlanders are successful in obtaining tourist visas to Canada. Those who are, frequently cite family or business as their primary purpose for travel to Canada. Although it is difficult for Chinese visitors to pass administrative barriers, an increasing number are travelling to Canada. Entries from China increased 15% (to 99,292) between 2001 and 2002, a period when entries from other Asian sources were declining. Due to ongoing security fears and the SARS outbreak in Canada and China, visitor arrivals from China fell 22% in 2003. In contrast to the expanding Chinese tourist market, travel from Hong Kong and Taiwan, both among Canada's top ten overseas tourist markets, has been contracting. However the lower numbers were most likely due to weak global economies, ongoing security fears, the war in Iraq and SARS.

An increasing number of Chinese visitors include Canada in their overseas travel plans



China is one of British Columbia's fastest growing international tourist sources.

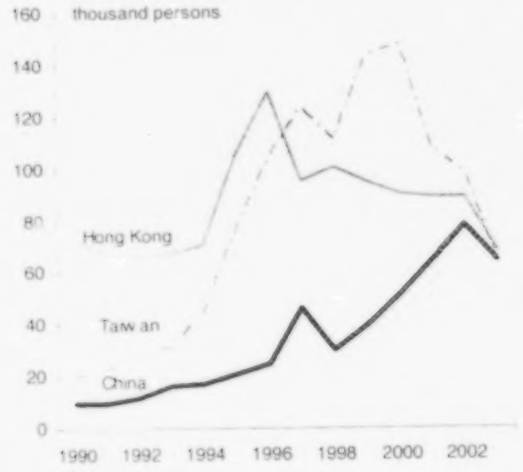
Although Canada as a whole attracts a fair share of Chinese visitors, BC is above the national average in terms of its share of the Chinese market. Not surprisingly, a higher

number of Chinese travellers visit BC because of the province's close proximity to Asia (it is the first port of entry for many Asian travellers) and also because it has a large Asian population.

Outstanding scenery, open spaces, safety and cleanliness could also lure more mainlanders to BC since most Chinese live in small apartments in very big and densely populated urban areas and therefore they are looking for something different during their trip. The province's mild climate is also an attractive factor.

Over the last three years, there has generally been an upward trend for Chinese tourists coming to BC, while other major Asian markets, such as Hong Kong and Taiwan have slowed down. BC received a dramatic increase of travellers from Hong Kong before 1997, due in part to uncertainties during the months leading up to the repatriation with China, but since then entries have been declining.

China is gearing up to be a significant tourist generator for BC



BC was a favoured choice for travellers from Taiwan until the late nineties when the number of visitors dipped possibly due to the economic downturn experienced by the middle and upper-income economies in Asia.

China has come a long way since 1949, when mostly government officials and a small number of people who had relatives abroad had the privilege of travelling overseas. With increasing personal income, more Chinese are seeking the opportunity to improve their life style and travel overseas. For Mainlanders the desire to travel can be traced back to the roots of Chinese culture, as one of their great poets Li Bai advises that a wise man should read ten thousand books and travel ten thousand miles.

Table 1: Room Revenue by Development Region ($000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Aug-03	22,635	68,289	17,383	5,930	3,513	1,623	733	4,039	124,146
Sep-03	22,451	67,074	16,786	5,784	3,480	1,604	731	3,481	121,389
Oct-03	23,370	67,567	17,845	6,186	3,789	1,602	756	3,831	124,946
Nov-03	23,522	68,571	18,031	5,991	3,668	1,632	716	3,804	125,936
Dec-03	23,865	69,937	19,844	6,467	3,760	1,754	727	4,219	130,573
Jan-04	25,263	68,664	18,665	6,396	3,601	1,686	716	3,916	128,906
Feb-04	23,923	69,305	18,665	6,653	3,679	1,655	723	4,272	128,874
Mar-04	23,637	68,667	18,933	6,176	3,837	1,594	616	4,282	127,742
Apr-04	23,743	72,661	18,580	6,513	3,646	1,672	791	5,051	132,658
May-04	23,534	72,585	18,940	6,121	3,651	1,621	729	3,842	131,023
Jun-04	24,024	72,776	18,583	6,200	3,772	1,673	738	3,887	131,654
Jul-04	24,317	72,127	18,922	6,426	3,780	1,720	727	4,087	132,107
Aug-04	24,135	69,253	18,026	6,123	3,834	1,687	713	3,911	127,683
Month-over-month growth rates									
Aug-03	3.4	6.5	2.8	2.1	-1.2	4.2	1.1	6.7	4.9
Sep-03	-0.8	-1.8	-3.4	-2.5	-0.9	-1.2	-0.4	-13.8	-2.2
Oct-03	4.1	0.7	6.3	6.9	8.9	-0.1	3.5	10.1	2.9
Nov-03	0.6	1.5	1.0	-3.1	-3.2	1.9	-5.3	-0.7	0.8
Dec-03	1.5	2.0	10.1	7.9	2.5	7.5	1.4	10.9	3.7
Jan-04	5.9	-1.8	-5.9	-1.1	-4.2	-3.9	-1.5	-7.2	-1.3
Feb-04	-5.3	0.9	0.0	4.0	2.2	-1.8	1.0	9.1	0.0
Mar-04	-1.2	-0.9	1.4	-7.2	4.3	-3.7	-14.8	0.2	-0.9
Apr-04	0.4	5.8	-1.9	5.5	-5.0	4.9	28.3	18.0	3.8
May-04	-0.9	-0.1	1.9	-6.0	0.1	-3.1	-7.8	-23.9	-1.2
Jun-04	2.1	0.3	-1.9	1.3	3.3	3.3	1.1	1.2	0.5
Jul-04	1.2	-0.9	1.8	3.6	0.2	2.8	-1.4	5.1	0.3
Aug-04	-0.7	-4.0	-4.7	-4.7	1.4	-1.9	-1.9	-4.3	-3.3

August month-over-month percent growth

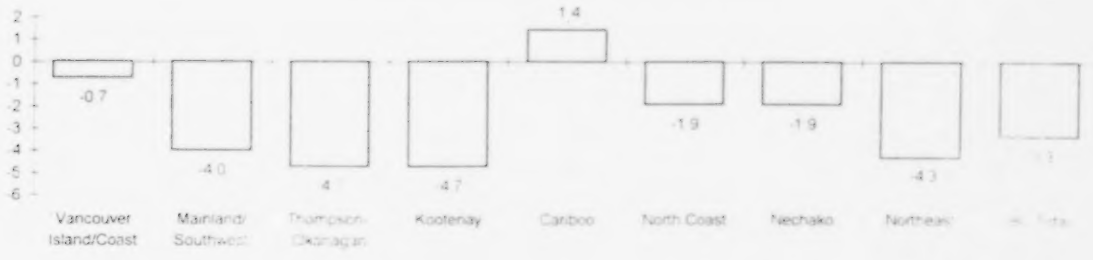


Table 2: Room Revenue by Accommodation Type ($000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			
				Annual data			
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
				Annual growth rates			
1999	5.4	15.3	15.3	12.9	2.2	19.2	12.0
2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
				Monthly data			
Aug-03	37,075	15,005	25,123	14,632	14,793	9,896	7,643
Sep-03	35,664	14,925	24,653	14,225	13,949	9,490	7,839
Oct-03	36,335	15,438	25,535	14,727	15,634	9,795	7,961
Nov-03	36,161	15,658	25,777	14,600	15,334	10,095	7,646
Dec-03	38,551	15,992	25,498	14,856	16,818	10,577	8,808
Jan-04	36,612	15,832	25,810	15,062	15,732	9,739	8,261
Feb-04	36,814	15,525	25,935	14,762	15,748	9,951	8,073
Mar-04	38,237	16,117	26,003	14,848	15,823	9,411	7,432
Apr-04	39,778	15,636	26,532	15,245	15,687	10,043	8,542
May-04	39,963	16,144	26,644	15,248	15,695	10,307	7,896
Jun-04	39,450	16,474	26,556	15,439	15,903	10,294	8,013
Jul-04	37,551	16,268	26,735	15,641	16,173	10,487	8,398
Aug-04	36,723	16,012	26,038	15,191	15,373	10,339	8,183
				Month-over-month growth rates			
Aug-03	6.7	4.7	5.4	3.5	1.8	1.3	0.9
Sep-03	-3.8	-0.5	-1.9	-2.8	-5.7	-4.1	2.6
Oct-03	1.9	3.4	3.6	3.5	12.1	3.2	1.6
Nov-03	-0.5	1.4	0.9	-0.9	-1.9	3.1	-4.0
Dec-03	6.6	2.1	-1.1	1.8	9.7	4.8	15.2
Jan-04	-5.0	-1.0	1.2	1.4	-6.5	-7.9	-6.2
Feb-04	0.6	-1.9	0.5	-2.0	0.1	2.2	-2.3
Mar-04	3.9	3.8	0.3	0.6	0.5	-5.4	-7.9
Apr-04	4.0	-3.0	2.0	2.7	-0.9	6.7	14.9
May-04	0.5	3.3	0.4	0.0	0.0	2.6	-7.6
Jun-04	-1.3	2.0	-0.3	1.3	1.3	-0.1	1.5
Jul-04	-4.8	-1.3	0.7	1.3	1.7	1.9	4.8
Aug-04	-2.2	-1.6	-2.6	-2.9	-4.9	-1.4	-2.6

August month-over-month percent growth

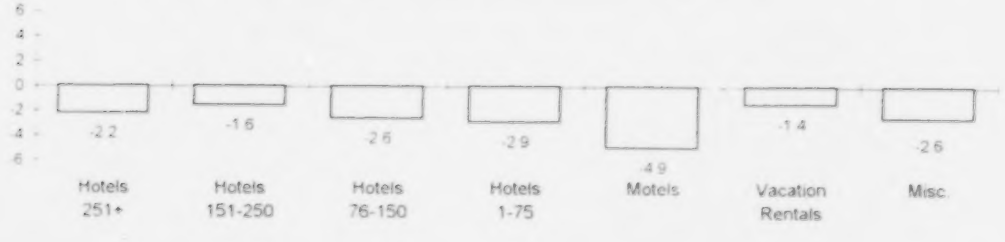


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Aug-04	Revenue ($000) YTD 04	% change from Aug-03	% change from YTD 03	Properties (#) Aug-04	Properties # chg from Aug-03	Rooms (#) Aug-04	Rooms # chg from Aug-03
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	**26,851**	**119,903**	**5.0**	**8.0**	**189**	**4**	**8,418**	**320**
Total - Hotels	21,091	97,804	4.2	9.1	69	2	5,597	256
76+ Rooms	15,864	75,093	5.4	11.1	26	1	3,937	236
1-75 Rooms	5,227	22,711	0.9	3.1	43	1	1,660	20
Motels	2,428	10,340	-7.3	0.6	31	-2	1,121	-43
Vacation Rentals	1,137	3,948	30.6	-6.3	29	2	372	74
19 Cowichan Valley								
Total - All accommodation types	**1,258**	**5,988**	**-4.3**	**3.0**	**37**	**0**	**662**	**-2**
Motels	276	1,369	-7.2	7.8	17	1	323	19
21 Nanaimo								
Total - All accommodation types	**6,324**	**27,666**	**-4.3**	**4.3**	**78**	**2**	**2,675**	**-121**
Total - Hotels	2,706	13,653	-6.1	5.6	21	1	1,286	-129
Motels	1,372	5,662	0.9	5.3	23	0	625	7
Vacation Rentals	1,932	6,999	-4.0	2.5	22	0	601	-3
23 Alberni-Clayoquot								
Total - All accommodation types	**7,625**	**27,781**	**14.4**	**11.1**	**68**	**5**	**1,557**	**76**
Total - Hotels	1,806	7,093	12.5	14.9	13	2	475	25
Motels	888	2,905	1.7	0.8	21	0	416	1
Vacation Rentals	2,593	9,637	29.9	15.7	15	3	332	56
25 Comox-Strathcona								
Total - All accommodation types	**5,165**	**22,325**	**5.0**	**6.0**	**92**	**3**	**2,112**	**2**
Fishing lodges	1,607	4,300	21.4	13.5	26	2	422	16
Motels	988	5,244	-3.6	6.1	24	-1	631	-49
Vacation Rentals	733	2,859	0.9	4.2	22	0	280	22
27 Powell River								
Total - All accommodation types	**501**	**3,291**	**22.9**	**47.2**	18	-1	370	-27
43 Mount Waddington								
Total - All accommodation types	**1,139**	**3,951**	**5.3**	**-0.4**	**28**	**0**	**732**	**-2**
Total - Hotels	660	2,311	6.8	-3.1	12	-1	538	-7
45 Central Coast								
Total - All accommodation types	**399**	**1,379**	**-6.8**	**-3.1**	13	-1	172	-7
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	**5,003**	**26,223**	**0.8**	**6.6**	**67**	**1**	**2,441**	**-51**
Total - Hotels	3,322	18,553	-1.1	6.0	19	-2	1,354	-76
Motels	1,262	5,522	1.7	9.0	38	0	933	0
15 Greater Vancouver								
Total - All accommodation types	**82,841**	**447,943**	**-0.0**	**10.5**	**248**	**-6**	**27,267**	**-68**
Total - Hotels	76,867	421,085	-0.6	10.7	162	-2	23,344	-100
251+ Rooms	41,083	231,171	-1.0	11.3	25	0	9,956	0
151-250 Rooms	14,654	79,667	1.1	10.0	25	0	4,752	-1
76-150 Rooms	15,424	82,062	0.2	9.9	54	0	5,849	3
1-75 Rooms	5,706	28,186	-3.8	9.5	58	-2	2,787	-102
Motels	2,541	12,197	4.1	5.5	37	0	1,602	58
Vacation Rentals	1,067	5,893	13.3	13.0	17	1	482	-4
29 Sunshine Coast								
Total - All accommodation types	**787**	**3,022**	**3.8**	**9.2**	**24**	**1**	**394**	**12**
31 Squamish-Lillooet								
Total - All accommodation types	**13,188**	**140,208**	**4.5**	**-7.8**	**99**	**2**	**7,443**	**334**
Total - Hotels	11,179	113,445	5.6	-6.4	47	2	5,775	324
76-150 Rooms	2,653	28,871	1.9	-2.3	15	0	1,519	0
1-75 Rooms	921	9,508	8.5	-3.2	21	1	827	48
Vacation Rentals	1,153	18,546	-5.9	-12.7	28	2	1,211	33
Miscellaneous	615	6,919	1.0	-16.1	17	-2	288	-23
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	**9,585**	**31,350**	**1.2**	**5.3**	**120**	**-5**	**3,257**	**-276**
Total - Hotels	3,895	14,971	-3.7	3.1	15	-3	1,057	-217
Motels	4,711	13,186	5.6	8.4	78	-5	1,820	-64
Vacation Rentals	764	2,343	2.9	-0.2	16	1	279	2

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000)		% change from		Properties (#)	# chg from	Rooms (#)	# chg from
	Aug-04	YTD 04	Aug-03	YTD 03	Aug-04	Aug-03	Aug-04	Aug-03
33 Thompson-Nicola								
Total - All accommodation types	7,994	46,724	10.2	14.2	168	-4	5,694	107
Fishing lodges	256	1,052	9.1	-2.0	14	-1	159	-8
Total - Hotels	3,490	21,131	1.3	16.8	35	0	2,274	26
1-75 Rooms	833	4,349	-4.8	6.6	23	0	885	26
Motels	3,073	14,330	16.2	18.2	76	1	2,287	36
Vacation Rentals	480	6,962	54.4	7.3	24	-2	600	90
Miscellaneous	695	3,228	12.8	3.1	19	-2	374	-37
35 Central Okanagan								
Total - All accommodation types	10,136	49,839	-1.1	4.8	70	0	3,582	-47
Total - Hotels	6,118	32,116	-0.2	5.2	19	-1	1,710	-71
Motels	2,550	10,098	-7.3	2.2	29	0	1,159	-24
Vacation Rentals	888	5,798	16.9	7.1	18	2	299	47
37 North Okanagan								
Total - All accommodation types	2,272	14,110	-16.5	-2.8	51	0	1,657	-45
Motels	944	4,376	-7.7	21.1	20	0	645	-3
39 Columbia-Shuswap								
Total - All accommodation types	7,028	28,573	-4.1	5.2	112	-3	3,395	-2
Total - Hotels	3,080	12,348	-4.7	8.0	20	0	1,236	-3
Motels	2,623	10,083	-4.5	5.1	49	0	1,589	36
Vacation Rentals	919	2,475	-4.2	-1.7	14	-2	176	-35
Kootenay								
01 East Kootenay								
Total - All accommodation types	6,553	39,788	1.9	6.6	111	-4	4,412	11
Total - Hotels	1,724	12,100	-8.1	2.1	24	-3	1,407	-32
Motels	1,908	8,051	9.0	5.0	52	0	1,224	7
Vacation Rentals	1,279	9,390	0.4	18.0	15	0	900	47
03 Central Kootenay								
Total - All accommodation types	2,736	13,101	-0.1	6.6	86	2	1,669	39
Total - Hotels	1,376	7,004	3.5	8.8	18	2	769	62
Motels	761	3,248	-10.4	-2.2	32	-1	559	-44
Vacation Rentals	325	1,090	2.5	12.2	20	0	157	0
05 Kootenay Boundary								
Total - All accommodation types	804	4,363	1.0	5.2	37	0	684	-20
Motels	548	2,371	-0.7	5.5	23	-1	382	-26
Cariboo								
41 Cariboo								
Total - All accommodation types	2,646	12,009	0.7	2.9	112	-6	2,172	-41
Fishing lodges	153	533	11.9	-2.3	17	-3	154	-28
Motels	1,193	6,075	1.3	3.5	34	-2	999	-52
Vacation Rentals	313	863	-22.7	-9.8	35	-2	341	37
Miscellaneous	247	1,032	14.0	0.7	15	1	154	2
53 Fraser-Fort George								
Total - All accommodation types	3,449	19,251	17.2	6.8	58	1	2,737	44
Total - Hotels	2,142	13,324	9.3	5.6	19	0	1,407	0
Motels	1,186	5,124	34.7	10.6	28	0	970	4
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	2,311	9,280	3.2	3.4	42	1	1,167	17
49 Kitimat-Stikine								
Total - All accommodation types	942	5,618	8.6	10.0	35	3	812	4
Motels	297	1,988	-0.7	3.4	15	1	364	-8
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	1,098	5,709	-3.8	-2.9	57	0	1,220	-50
Fishing lodges	68	301	-29.4	-4.4	12	1	83	4
Motels	584	3,197	-7.2	-5.6	25	0	669	1
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	4,025	35,348	1.2	8.7	71	5	3,612	841
Total - Hotels	2,168	16,662	24.3	23.1	23	3	1,579	145
Motels	1,183	7,986	4.6	8.2	33	1	923	23

** Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	($000)		% change from		(#)	# chg from	(#)	# chg from
	Aug-04	YTD 04	Aug-03	YTD 03	Aug-04	Aug-03	Aug-04	Aug-03
Vancouver Island/Coast	49,262	212,284	4.8	7.7	523	12	16,698	239
Victoria (C)	20,487	94,999	4.1	8.9	83	3	5,629	257
Other CRD	6,364	24,904	7.7	4.4	106	1	2,789	63
Nanaimo (C)	2,595	13,800	3.2	6.7	23	1	1,226	20
Port Alberni (C)	607	2,628	2.1	8.3	16	3	391	30
Courtenay (C)	857	5,692	-	-	10	1	422	4
Rest of Development Region	18,351	70,261	-	-	295	4	6,241	-135
Mainland/Southwest	**101,819**	**617,396**	**0.6**	**5.6**	**438**	**-2**	**37,545**	**227**
Downtown Vancouver (C)	53,936	288,778	-0.2	12.1	84	-1	12,827	-150
Other Vancouver (C)	4,609	22,572	-6.1	3.4	39	-6	2,691	-127
Richmond (C)	11,771	67,891	-1.9	8.8	24	-1	4,267	-70
Burnaby (C)	3,260	18,772	3.0	8.5	12	0	1,635	362
Other GVRD	9,265	49,929	6.0	7.7	89	2	5,847	279
Whistler (DM)	12,385	135,396	4.7	-7.9	76	2	6,896	334
Rest of Development Region	6,593	34,057	1.2	5.3	114	2	3,382	-401
Thompson/Okanagan	**37,014**	**170,596**	**-0.0**	**6.7**	**521**	**-12**	**17,585**	**-263**
Penticton (C)	5,414	18,308	0.8	5.8	50	-3	1,753	-270
Kamloops (C)	5,537	35,747	10.4	17.4	72	2	3,785	169
Kelowna (C)	8,489	44,183	-0.0	4.9	51	3	2,990	29
Vernon (C)	1,921	13,011	-19.1	-3.4	30	-1	1,443	-53
Revelstoke (C)	2,192	10,710	-4.1	4.3	30	-1	1,223	-50
Rest of Development Region	13,463	48,637	-0.2	5.0	288	-12	6,391	-88
Kootenay	**10,095**	**57,252**	**1.3**	**6.5**	**234**	**-2**	**6,765**	**30**
Cranbrook (C)	1,100	5,528	-1.0	4.5	18	2	823	65
Nelson (C)	838	4,583	-9.0	4.8	14	1	440	2
Rest of Development Region	8,157	47,140	2.8	6.9	216	-4	5,942	-35
Cariboo	**6,096**	**31,259**	**9.5**	**5.3**	**170**	**-5**	**4,909**	**3**
Quesnel (C)	414	2,458	-5.0	5.2	12	0	427	0
Williams Lake (C)	657	3,259	8.2	2.8	12	0	574	-34
Prince George (C)	2,256	14,048	8.8	4.8	30	1	1,950	44
Rest of Development Region	2,768	11,493	12.9	6.6	116	-6	1,958	-7
North Coast	**3,253**	**14,898**	**4.7**	**5.8**	**77**	**4**	**1,979**	**21**
Prince Rupert (C)	1,047	5,028	6.6	4.3	16	0	773	0
Terrace (C)	518	3,205	14.9	10.8	13	2	423	38
Rest of Development Region	1,688	6,665	0.9	4.6	48	2	783	-17
Nechako	**1,098**	**5,709**	**-3.8**	**-2.9**	**57**	**0**	**1,220**	**-50**
Smithers (T)	566	2,707	7.4	2.5	15	1	451	27
Rest of Development Region	532	3,002	-13.5	-7.4	42	-1	769	345
Northeast	**4,025**	**35,348**	**1.2**	**8.7**	**71**	**5**	**3,612**	**841**
Dawson Creek (C)	589	4,405	-2.8	18.5	14	0	524	29
Fort St. John (C)	1,473	14,307	27.1	15.5	21	1	1,602	93
Rest of Development Region	1,963	16,636	-11.3	1.4	36	4	1,486	719

(*) Data for regions with fewer than 10 properties reporting can not be released

Table 5: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,109	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Aug-03	47,004	101,199	37,026	9,969	5,569	3,107	1,142	3,978	208,993
Sep-03	31,458	72,552	20,022	6,662	4,774	2,338	1,091	3,536	142,433
Oct-03	19,909	52,270	13,801	4,244	3,775	1,207	963	3,455	99,623
Nov-03	12,753	41,418	8,039	2,484	2,622	903	538	2,967	71,724
Dec-03	11,763	59,336	11,652	5,024	2,199	831	454	3,803	95,060
Jan-04	10,891	59,530	12,523	5,875	2,276	791	415	4,428	96,729
Feb-04	14,125	68,452	15,086	8,185	2,450	1,033	459	6,323	116,112
Mar-04	17,288	74,357	15,792	7,768	3,224	1,040	507	6,565	126,540
Apr-04	19,496	63,491	12,696	5,004	3,223	1,056	545	4,482	109,993
May-04	25,608	71,530	18,051	4,761	3,831	1,504	652	2,397	128,335
Jun-04	31,377	81,620	21,926	5,917	4,691	2,786	981	3,231	152,530
Jul-04	44,238	96,596	37,509	9,647	5,469	3,434	1,051	3,896	201,840
Aug-04	49,262	101,819	37,014	10,095	6,096	3,253	1,098	4,025	212,662
Year-over-year percent changes									
Aug-03	2.5	-3.6	-1.0	-8.9	-6.7	2.7	3.3	31.1	-1.6
Sep-03	2.5	-3.8	-4.5	-7.5	-7.4	-0.6	-1.1	4.5	-2.6
Oct-03	7.0	-5.8	3.1	7.1	1.4	5.2	-6.5	8.4	-0.9
Nov-03	7.1	-0.9	7.6	0.0	-0.5	4.4	-8.1	18.7	2.1
Dec-03	4.6	0.0	12.7	13.6	6.6	27.1	3.0	70.9	4.8
Jan-04	13.9	-4.4	3.3	8.0	1.1	8.0	-6.0	10.5	-0.1
Feb-04	9.7	-5.5	11.6	12.1	8.4	6.9	-14.0	24.7	1.0
Mar-04	3.8	1.4	7.0	0.3	7.8	-7.2	-15.9	-4.2	2.0
Apr-04	5.9	14.1	6.7	15.2	1.0	5.0	7.0	28.3	11.7
May-04	4.7	11.6	10.5	1.7	1.3	4.3	-2.1	-2.2	8.8
Jun-04	9.0	17.0	2.4	5.0	4.6	6.8	5.7	12.0	11.8
Jul-04	12.4	12.1	14.1	11.6	5.8	10.7	-0.7	3.6	12.1
Aug-04	4.8	0.6	0.0	1.3	9.5	4.7	-3.8	1.2	1.8

August year-over-year percent change

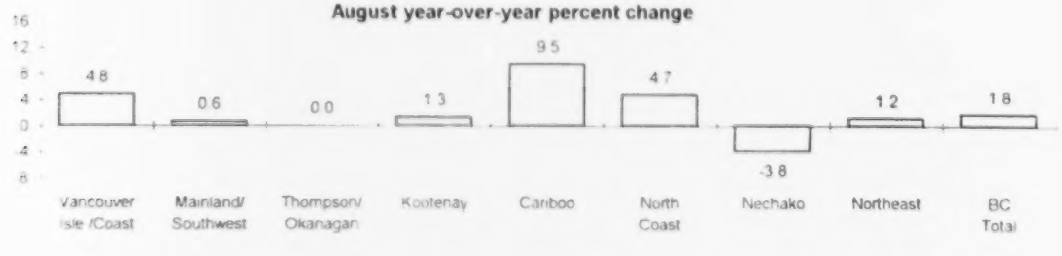


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International						
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**
Annual data								
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,960.1	6,583.2	2,808.1	3,787.8	1,376.9	764.0	411.8	118.0
2003	7,327.4	6,124.8	2,580.7	3,556.7	1,202.6	577.6	410.1	124.8
Annual percent changes								
1999	5.4	4.8	7.9	2.0	8.6	9.7	7.8	6.6
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.2	-4.5	-13.8	4.2	-2.9	4.4	-11.7	-10.5
2003	-7.9	-7.0	-8.1	-6.1	-12.7	-24.4	-0.4	5.8
Monthly data								
Sep-03	618.1	515.2	214.8	287.4	102.9	50.4	32.8	11.1
Oct-03	613.5	508.7	216.4	289.7	104.8	57.5	33.3	9.6
Nov-03	607.7	502.2	211.0	291.6	105.5	55.2	34.2	10.2
Dec-03	613.0	504.9	209.7	294.1	108.1	55.4	34.3	11.1
Jan-04	597.4	488.2	204.9	285.8	109.3	55.8	34.3	11.8
Feb-04	600.8	490.0	206.8	287.3	110.9	55.7	35.3	10.9
Mar-04	613.2	505.8	210.7	300.1	107.4	57.5	35.2	9.2
Apr-04	627.8	510.5	211.0	302.2	117.4	61.7	35.7	11.7
May-04	625.9	502.8	205.9	301.6	123.1	63.3	38.2	13.1
Jun-04	633.2	509.2	211.8	299.4	124.1	64.8	38.3	12.9
Jul-04	627.1	506.7	211.3	299.0	120.4	57.7	40.5	12.8
Aug-04	602.6	487.5	202.9	293.1	115.1	53.3	37.6	12.7
Sep-04	644.4	526.4	205.2	307.1	118.1	56.1	39.4	12.9
Month-over-month growth rates								
Sep-03	-0.9	-1.3	-1.0	-7.7	0.9	-0.6	-3.1	5.2
Oct-03	-0.7	-1.3	0.8	0.8	1.8	14.1	1.6	-13.4
Nov-03	-1.0	-1.3	-2.5	0.7	0.7	-3.9	2.6	5.8
Dec-03	0.9	0.5	-0.6	0.9	2.5	0.3	0.3	9.3
Jan-04	-2.5	-3.3	-2.3	-2.8	1.1	0.7	0.1	5.5
Feb-04	0.6	0.4	0.9	0.5	1.5	-0.2	2.8	-7.3
Mar-04	2.1	3.2	1.9	4.4	-3.1	3.3	-0.1	-15.7
Apr-04	2.4	0.9	0.1	0.7	9.3	7.2	1.4	27.5
May-04	-0.3	-1.5	-2.4	-0.2	4.9	2.6	6.8	11.6
Jun-04	1.2	1.3	2.9	-0.7	0.8	2.4	0.5	-1.6
Jul-04	-1.0	-0.5	-0.3	-0.1	-3.0	-10.9	5.6	-0.3
Aug-04	-3.9	-3.8	-4.0	-2.0	-4.4	-7.7	-7.0	-1.2
Sep-04	6.9	8.0	1.2	4.8	2.6	5.2	4.6	1.4

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquihalla Hwy
	Total	Domestic	Trans-border	Other Int'l.	Total	Vehicles	Passengers	Passenger Vehicles
Annual data								
1999	15,807	8,314	4,120	3,373	1,191	7,852	21,369	2,388
2000	16,032	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,869	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,321	7,266	3,814	3,240	1,183	8,263	21,348	2,480
Annual growth rates								
1999	1.9	1.2	-0.1	6.4	-1.9	0.4	-0.2	0.5
2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
Monthly data								
Sep-03	1,211	613	317	281	101	695	1,783	196
Oct-03	1,226	622	316	287	105	694	1,785	217
Nov-03	1,255	630	325	301	104	689	1,770	197
Dec-03	1,268	644	324	300	106	645	1,672	210
Jan-04	1,252	632	321	299	104	679	1,750	197
Feb-04	1,282	662	327	293	106	709	1,817	213
Mar-04	1,277	650	328	298	102	717	1,836	222
Apr-04	1,306	654	339	313	105	712	1,868	221
May-04	1,318	659	332	328	103	702	1,819	215
Jun-04	1,326	669	324	332	104	702	1,808	213
Jul-04	1,315	672	320	323	105	705	1,817	218
Aug-04	1,298	656	327	315	100	695	1,786	207
Sep-04	1,343	684	337	322	109	709	1,825	221
Month-over-month growth rates								
Sep-03	-1.8	-1.0	-6.0	1.7	-1.3	-1.1	-2.6	-3.2
Oct-03	1.2	1.6	-0.3	2.2	3.8	-0.1	0.1	10.4
Nov-03	2.4	1.1	2.8	4.6	-0.9	-0.7	-0.9	-9.0
Dec-03	1.0	2.4	-0.3	-0.3	2.0	-6.4	-5.5	6.4
Jan-04	-1.2	-1.8	-1.0	-0.2	-1.6	5.2	4.7	-5.9
Feb-04	2.4	4.7	2.1	-2.1	1.4	4.4	3.8	8.0
Mar-04	-0.4	-1.8	0.3	1.8	-3.1	1.1	1.0	4.3
Apr-04	2.3	0.6	3.4	4.8	2.3	-0.6	1.7	-0.7
May-04	0.9	0.7	-2.3	4.8	-1.6	-1.5	-2.6	-2.4
Jun-04	0.6	1.6	-2.2	1.4	0.7	0.1	-0.6	-1.1
Jul-04	-0.8	0.3	-1.2	-2.6	1.0	0.5	0.5	2.2
Aug-04	-1.3	-2.4	2.2	-2.7	-4.7	-1.5	-1.7	-4.7
Sep-04	3.5	4.3	2.9	2.3	9.0	2.0	2.2	6.6

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry[2]		Consumer Price Index[1]	
	Total tourism related	Air transport[4]	Accom-modation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%)[3]	Room Rate ($)	Traveller accom-modation	Restaurant food[4]
Annual data									
1999	181.7	15.3	29.2	110.1	27.1	61.7	112.03	133.1	115.6
2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	117.00	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.61	111.8	127.6
Annual Growth Rates									
1999	-1.5	-3.6	-0.5	0.4	-8.5	-0.2	3.1	2.4	1.5
2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.7	0.8	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-2.9	-9.9	1.8
Monthly data									
Sep-03	190.2	12.6	29.0	115.6	32.9	57.8	113.20	105.6	128.2
Oct-03	189.2	12.7	28.7	116.1	31.8	59.8	114.30	108.5	128.3
Nov-03	192.8	12.6	28.3	118.7	33.2	60.5	113.70	108.0	128.7
Dec-03	194.0	12.3	28.2	120.2	33.2	60.6	114.60	106.7	128.6
Jan-04	194.9	12.8	27.6	120.7	33.8	60.3	114.00	104.3	128.9
Feb-04	193.7	12.9	27.5	119.8	33.4	59.1	113.40	103.1	129.0
Mar-04	193.6	12.7	27.5	118.3	35.1	61.1	113.60	103.1	129.2
Apr-04	192.3	12.7	27.7	117.5	34.4	62.0	115.90	102.8	129.7
May-04	192.7	12.8	28.5	117.2	34.2	61.7	115.80	102.5	129.8
Jun-04	192.4	13.2	27.6	117.5	34.1	62.3	115.60	102.2	129.9
Jul-04	192.0	13.0	27.7	116.9	34.5	61.4	115.90	101.6	129.8
Aug-04	193.5	13.2	27.4	117.5	35.5	59.0	115.70	100.4	129.7
Sep-04	193.6	13.2	27.7	117.1	35.6	61.8	116.40	100.9	129.9
Month-over-month growth rates									
Sep-03	-1.6	0.9	-1.0	-1.9	-2.0	-1.7	0.3	-3.6	0.0
Oct-03	-0.5	0.4	-1.3	0.4	-3.3	2.0	1.0	2.7	0.1
Nov-03	1.9	-0.3	-1.2	2.2	4.3	0.7	-0.5	-0.5	0.3
Dec-03	0.6	-2.4	-0.3	1.3	0.1	0.1	0.8	-1.2	-0.1
Jan-04	0.4	3.6	-2.2	0.4	1.6	-0.3	-0.5	-2.2	0.2
Feb-04	-0.6	1.5	-0.3	-0.7	-1.0	-1.2	-0.5	-1.2	0.1
Mar-04	0.0	-1.7	-0.1	-1.3	5.0	2.0	0.2	0.0	0.2
Apr-04	-0.7	-0.2	0.6	-0.7	-1.9	0.9	2.0	-0.3	0.4
May-04	0.2	0.6	2.7	-0.2	-0.5	-0.3	-0.1	-0.3	0.1
Jun-04	-0.2	3.1	-3.0	0.2	-0.4	0.6	-0.2	-0.3	0.1
Jul-04	-0.2	-1.5	0.3	-0.5	1.1	-0.9	0.3	-0.6	-0.1
Aug-04	0.8	1.6	-1.1	0.5	3.0	-2.4	-0.2	-1.2	-0.1
Sep-04	0.0	0.2	1.1	-0.3	0.4	2.8	0.6	0.5	0.2

[1]Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

[2]Source: Pannell Kerr Forster and BC Stats

[3]Occupancy Rate change expressed as percentage point change

[4] No identifiable seasonality

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns [1]					
	Receipts ($ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
Annual data						
1999	4,467.5	369.8	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
2003	5,388.8	284.4	5,104.3	33,648.9	2,089.1	31,559.8
Annual growth rates						
1999	-3.7	-7.3	-3.4	4.3	12.9	3.6
2000	8.1	-2.9	9.1	7.5	8.4	7.4
2001	7.1	-0.3	7.7	6.6	3.2	6.8
2002	-1.5	-14.6	-0.5	2.8	-1.7	3.1
2003	5.6	-7.0	6.4	1.6	-6.8	2.2
Monthly data						
Apr-03	427	24	403	2,722	178	2,544
May-03	430	24	406	2,774	173	2,602
Jun-03	430	24	406	2,778	175	2,603
Jul-03	451	24	427	2,794	181	2,612
Aug-03	460	24	436	2,820	174	2,646
Sep-03	464	23	441	2,828	168	2,660
Oct-03	470	22	448	2,866	168	2,698
Nov-03	477	23	454	2,887	169	2,717
Dec-03	478	24	454	2,882	167	2,715
Jan-04	479	22	456	2,869	158	2,711
Feb-04	485	23	463	2,923	166	2,757
Mar-04	498	23	475	2,941	169	2,771
Apr-04	518	24	494	2,949	167	2,781
Month-over-month growth rates						
Apr-03	-0.5	3.8	-0.8	-1.5	0.6	-1.6
May-03	0.6	-3.0	0.8	1.9	-3.1	2.3
Jun-03	0.1	1.4	0.0	0.1	1.3	0.0
Jul-03	5.0	1.3	5.2	0.6	3.5	0.4
Aug-03	2.0	-1.1	2.2	0.9	-3.9	1.3
Sep-03	0.7	-6.1	1.1	0.3	-3.6	0.5
Oct-03	1.4	-1.8	1.5	1.4	0.3	1.4
Nov-03	1.5	2.3	1.4	0.7	0.5	0.7
Dec-03	0.2	4.7	-0.1	-0.2	-1.4	-0.1
Jan-04	0.2	-5.5	0.5	-0.5	-5.4	-0.2
Feb-04	1.4	1.2	1.4	1.9	5.3	1.7
Mar-04	2.5	1.3	2.6	0.6	1.9	0.5
Apr-04	4.1	5.9	4.0	0.3	-1.3	0.4

[1]Source: Statistics Canada & BC Stats.

BRITISH COLUMBIA

BC STATS

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Tourism Sector Monitor ◆ December 2004

Room Revenue

Room revenues rebounded in September (+4.9% *seasonally adjusted*), as all but two regions posted increases, regaining the ground lost in August. Revenues expanded in almost all regions with the exception of Cariboo (-0.7%) and North Coast (-2.9%).

Mainland Southwest was the major engine of revenue growth (+6.0%), supported by the smaller Nechako (+6.0%) and Kootenay (+5.8%) regions. Vancouver Island/Coast (+2.6%) also experienced a significant upturn from the levels posted in August.

Room revenues recover in September

Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type	Sep 04 ($000)	Aug 04 ($000)	% change
Total	134,523	128,281	+4.9
Hotels	98,889	94,388	+4.8
Motels	15,960	15,280	+4.5
Other Acc.	19,239	18,621	+3.3
Regions (Top 3 performers)			
Mainland/Southwest	73,910	69,757	+6.0
Nechako	756	713	+6.0
Kootenay	6,500	6,145	+5.8

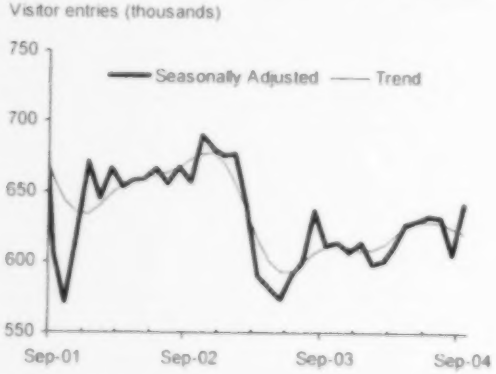
Province-wide, revenues were up for every type of tourism establishment. The greatest gain was recorded by very large hotels (with 251+ rooms, +6.7%).

Non-standard accommodation types (including bed and breakfast and other types of short-term accommodation) bounced back (+5.1%) after a significant decline in August. Revenues also rebounded at hotels with 151-250 rooms (+4.4%), as well as mid-size (76-150 rooms, +3.3%) and small (1-75 rooms, +3.0%) hotels.

Visitor Entries

The number of visitors entering Canada via BC border crossings increased 6.3% in September. This was a strong rebound from the decline experienced in August. Entries from the US jumped 7.3%, largely due to more overnight visits (+5.6%). Overseas entries increased (+2.1%), with strong growth from Asia (+5.0%) and Europe (+4.6%). The upturn in Asian travel was mainly due to continuous interest from Taiwan (+8.4%), South Korea (7.0%) and Japan (+1.1%).

Visitor entries bounced back in September



In September, the number of Canadians returning to BC increased (+5.3%) for the second time since March. More Canadians

(+5.9%) made same-day car trips south of the border, as well as travelling to overseas destinations (+10.0%).

	Sep-04 ('000)	Aug-04 ('000)	% chg from Aug-04
American visitors			
Total	529	493	7.3
Same-day	205	203	1.1
Overnight	307	291	5.6
Overseas visitors			
Total	118	115	2.1
Europe	39	38	4.6
UK	20	19	4.8
Asia	57	54	5.0
Japan	19	19	1.1
Taiwan	7	7	8.4
Oceania	13	13	0.7

(BC STATS & Statistics Canada)

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

In the hotel industry, both average room rates (+0.6%) and hotel occupancy (+2.9 percentage points) increased in September.

Employment in key tourism-related industries saw modest job losses (-0.1%) in September which mainly occurred in the food and beverage service sector (-0.6%).

The consumer price index for traveller accommodation fell (-0.1%), while the cost of restaurant food edged up marginally (+0.2%).

Transportation indicators also bounced back in September. Passenger traffic (+3.5%) at the Vancouver Airport increased in tandem with visitor entries in September.

There were more overseas passengers (+2.3%) as well as more people travelling to and from the US (+2.9%). Victoria International Airport posted the biggest month-over-month increase (+9.4%) since September 2003.

BC Ferries were busier in September, carrying more passengers (+2.8%) and vehicles (+2.1%). On the Coquihalla Highway, 6.5% more passenger vehicles passed through its tollbooths. This may be related to the timing of Labour Day, which fell on September 6th this year, allowing many families with school aged children to extend their summer vacation into the first week of the month.

Although the Canadian dollar appreciated slightly, the exchange rate fluctuations in September were too small to have any meaningful effect on tourism.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Sep-04	Change from Aug-04
Hotel Industry		
Occupancy rate	61.9	2.9 pp
Average room charge	116.30	0.6%
(Pannell Kerr Forster)		
Airport Passengers	**(000s)**	**(%)**
Vancouver International Airport		
Total traffic	1,343	3.5
US (trans-border)	337	2.9
Other International	322	2.3
Canada (domestic)	684	4.3
(YVR)		
Victoria International Airport		
Total traffic	110	9.4
(Victoria Airport Authority)		
Transportation	**(000s)**	**(%)**
Coquihalla Highway		
Passenger Vehicles	221	6.5
(Ministry of Transportation & Highways)		
BC Ferries		
Vehicle Volume	709	2.1
Passenger Volume	1,830	2.8
(BC Ferries)		
Exchange Rates	**Cdn $**	
US $	0.777	0.01
UK Pound	0.433	0.01
Japanese Yen	85.485	1.49
Australian $	1.105	0.03
(Statistics Canada)		

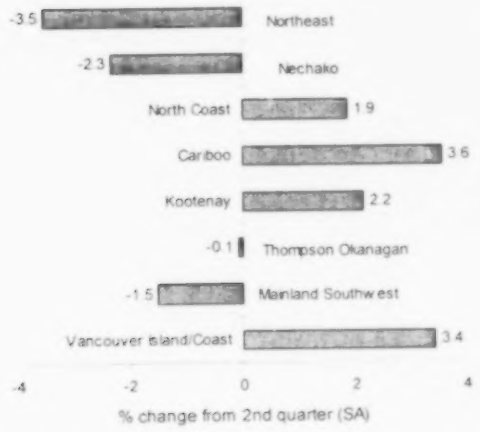
Note to readers: all data in the *Tourism Sector Monitor* are now reported on a **seasonally adjusted** basis.

Third Quarter Review of BC's Tourism Sector

Room revenues were virtually unchanged in the third quarter (-0.1%, *seasonally adjusted)*, after a robust second quarter (+2.7%).

Revenues varied considerably across development regions, falling in four of the province's eight Development Regions.

Cariboo and Vancouver Island/Coast led second quarter growth



Strong performances in Vancouver Island/Coast (+3.4%), the second largest development region, Cariboo (+3.6%) and Kootenay (+2.2%) were offset by declines in Mainland/Southwest (-1.5%) and in the rest of the province.

Hotels of all sizes saw slower business in the third quarter. The decrease was especially pronounced at large establishments (251+ rooms, -4.1%).

Revenues at non-standard accommodation types (including bed and breakfast and other short-term accommodation) posted the greatest gain (+4.2%).

As with room revenues, the volume of travellers entering Canada via BC was unchanged (-0.1%) in the third quarter. This was a result of slow growth in US (+0.5%) entries combined with a decline in travel from overseas (-2.9%). The downturn was mainly due to a decline in the number of visitors from Asia (-12.8%) and slower growth in the number of travellers from Europe (+4.4%) and South Pacific (+1.4%) compared to the second quarter.

Hotel occupancy decreased (-1.2 percentage points) to 60.8% in the third quarter while room rates where virtually unchanged (+0.2%) from the second quarter.

The number of passengers (-1.3%) and vehicles (-0.4%) aboard BC Ferries was down compared to the second quarter of 2004.

Traffic on the Coquihalla Highway, the main route connecting the southwest part of the province with BC, was virtually unchanged in the third quarter of 2004 (-0.4%).

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues slipped (-2.5%, *seasonally adjusted*) in October. Slower growth was experienced in almost every region except for Cariboo (+2.7%), North Coast (+0.8%) and Northeast (+2.6%). The downturn was partly due to loss of revenue for very large (251+ rooms, -8.6%) and large (151-250 rooms, -2.5%) hotels.

After a month of recovery from the substantial drop in August, visitor entries in BC fell 5.8% in October. This was a result of declines in both US (-6.8%) and overseas (-0.9%) entries. Passenger traffic dropped at Victoria airport (-5.5%). There was some passenger (+0.9%) and vehicle (+0.5%) growth on BC Ferries, but this was modest after a month of relatively moderate growth.

Overall, the preliminary indications suggest that October was a relatively weak month for tourism in BC.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

Special Focus: Bed and Breakfast

Bed and Breakfasts (B&Bs) are a unique lodging alternative to hotels and motels, typically offering a much more personal and cosy atmosphere compared to other types of lodging. Although the accommodation market is dominated by hotels and motels, Bed and Breakfast properties have seen steady growth since the late nineties as an increasing number of travellers seek out this type of accommodation.

About B&Bs

The term B&B first came into use in Great Britain, but the practice of serving bed and breakfast to guests began during the middle ages, when monasteries housed travellers. Even today, convents and monasteries in Europe offer modest but safe accommodations to those on the road.

In the United States, the Great Depression greatly contributed to popularizing B&Bs, when many people chose to open their homes to travellers in order to subsidize their income. As incomes rose and an increasing number of hotels and motels were built, B&Bs went out of vogue, being viewed as low-income lodging.

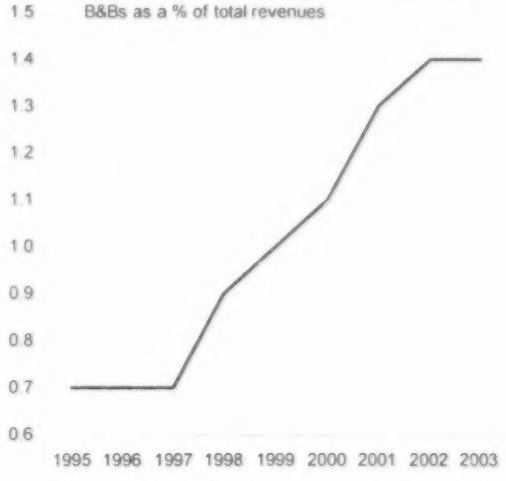
In recent years B&Bs have received an increasing interest from tourists. Nowadays, they are viewed by many as an appealing alternative to the typical standard accommodation with some offering amenities comparable to those available at upscale hotels.

The Internet has played a role in the rising popularity of B&Bs. It opened the way to global advertising of B&B properties, including those run by private individuals. For the cost of setting up and maintaining a webpage advertising their services, many B&B operators are able to promote their properties to wired-in travellers all over the globe, something that was usually beyond their grasp in the past. However, the Internet is not the only explanation for the surge in interest in B&Bs: they were already popular before there was widespread access to this global cultural phenomenon. Many guidebooks and similar resources for travellers in North America now provide listings of B&B properties are available to travellers seeking this type of accommodation.

Bed and Breakfast the fastest growing segment of the lodging business

Since 1995, the room supply of B&Bs has increased 59% – more than twice the rate for hotel and motels combined (+18%). Room revenues have nearly tripled for this type of establishment since 1995 (compared to 39% for hotels and motels). This points to a gradual increase in traveller's preferences towards accommodations that offer more personal experiences and sometimes, more value for their money.

Bed and Breakfast revenues on the rise



Based on size, there are two categories of B&Bs: B&B Inns, which are multi-room structures devoted to travellers, and B&B homes, which are residential properties of private families that have decided to sup-

plement their income by renting out spare rooms to paying guests.

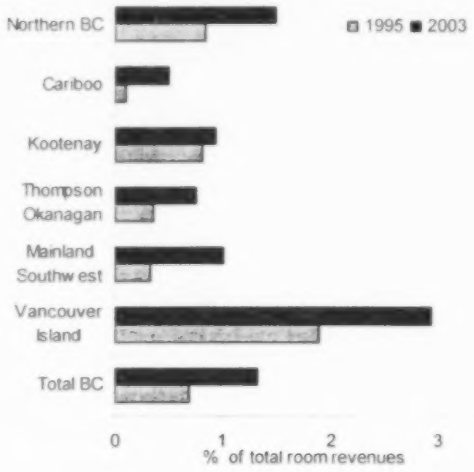
B&B Inns are usually independently run, and owners are not always able to compete with special price incentives offered by large accommodation properties, nor do they provide some of the features enjoyed by clients staying at larger hotels, such as exercise facilities, conference rooms, and other features typically sought after by business travellers. However, they attract travellers who are looking for a more intimate atmosphere at a location which may be further away from busy business districts. Many are located in converted historic properties. B&B Inns have fewer rooms than hotels, allowing the owner more time to attend to his or her guests' needs personally, and offer extra services such as: breakfast (often gourmet meals) included in the room rate; free local and toll-free calls; and the opportunity to interact with other guests in a more informal setting. Also, the bellman is likely to be the innkeeper, so no tipping is required. However, these facilities do not offer some features that many travellers seek, such as private bathroom facilities, or room service, and many travellers still prefer conventional accommodation with more amenities and a higher level of privacy.

B&B homes are more likely to be located in residential areas and even in rural settings. The hosts of these establishments are hospitable and often a great source of information on local events and things to do. Aside from the more upscale B&B Inns, this type of accommodation also caters to cost-conscious travellers, as the less expensive B&Bs are most likely to be found in private homes.

Regional differences

B&Bs with four or more rooms made up about 8%[1] of all accommodation properties in the province, and generated just over 1% of total room revenues in 2003. Although these B&Bs remain a small segment of the accommodation market, they have nearly doubled their market share (from 0.7% to 1.3% of room revenues) since 1995, with every region of the province seeing an increase during this period. In Vancouver Island/Coast, nearly 3% of room revenues are earned by B&B properties. In Cariboo, the region where B&Bs are least popular, these properties generate 0.5% of total room revenues. Across the province, revenues have increased substantially more than the number of B&B properties since 1995, pointing to an increased preference for this type of establishment.

B&Bs have the biggest market share in Vancouver Island/Coast, but shares are growing in all regions of the province



Since 1995, the largest gain in property numbers has been in the North and

[1] *Only properties with at least four rooms are included in these figures, since Room Revenue data are based on information from hotel tax revenue files. Properties renting out fewer than four rooms are not subject to the Hotel Tax, so do not appear in these figures since no comparable data is available for these properties.*

Mainland/Southwest, where the number of B&Bs (with four or more rooms) has more than doubled. Kootenay is the only region where the number of B&Bs has changed only marginally since 1995.

The importance of B&B accommodations in many regions of the province is growing. In 1995, half of all B&B revenues in the province originated in the Vancouver Island/Coast region. Since then, B&Bs in other areas of the province have picked up steam. Vancouver Island/Coast's share of total B&B revenues has fallen to 41%, as revenue growth in other parts of BC has been stronger. Mainland/Southwest now generates 20% of total B&B earnings (up from 13% in 1995). In Northern BC, the share has jumped to just over 10%.

B&Bs have the strongest presence in Vancouver Island/Coast, where 13% of all accommodation properties are B&Bs. The market for B&Bs in the Vancouver Island area is well established, possibly because the region has long been a favoured destination for travellers seeking to experience "old world charm" on Canada's West Coast. In 2003, B&Bs generated nearly 3% of total room revenues in this region, well above the provincial average (0.7%), and considerably more than in any other region of the province.

In Mainland/Southwest – the region encompassing Vancouver and its surrounding areas – B&Bs have experienced an expansion in both the number of properties (+6.6 percentage points) and revenues (+0.7 percentage points) in the last eight years. However, this is mostly an urban market, dominated by standard accommodation.

There is a trend toward a growing preference for smaller and more home-grown services. An increasing number of leisure and business travellers are looking for establishments that offer a more personalized service and the kind of hospitality that traditional types of accommodations can't duplicate. While B&Bs and other non-standard accommodation still hold a relatively small share of the tourism market, they are becoming important competitors to standard establishments.

Table 1: Room Revenue by Development Region ($000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Sep-03	22,358	65,850	16,740	5,703	3,493	1,615	719	3,644	120,122
Oct-03	23,324	67,359	17,858	6,161	3,776	1,606	755	3,812	124,652
Nov-03	23,491	68,444	18,048	5,993	3,671	1,632	715	3,760	125,754
Dec-03	23,920	69,881	19,811	6,478	3,761	1,750	727	4,210	130,539
Jan-04	25,223	68,686	18,659	6,411	3,609	1,685	717	3,970	128,961
Feb-04	23,939	69,343	18,656	6,593	3,671	1,654	722	4,238	128,816
Mar-04	23,654	68,796	18,924	6,198	3,830	1,595	618	4,195	127,810
Apr-04	23,776	72,938	18,582	6,546	3,639	1,670	793	4,186	132,131
May-04	23,569	72,924	18,958	6,149	3,649	1,618	732	3,852	131,451
Jun-04	24,067	73,303	18,627	6,235	3,773	1,670	740	3,863	132,279
Jul-04	24,362	72,709	19,037	6,479	3,784	1,716	730	4,141	132,958
Aug-04	24,236	69,757	17,930	6,145	3,841	1,683	713	3,975	128,281
Sep-04	24,862	73,910	18,884	6,500	3,815	1,634	756	4,162	134,523
Month-over-month growth rates									
Sep-03	-1.4	-4.1	-3.4	-4.0	-0.7	-0.3	-2.3	-9.4	-3.5
Oct-03	4.3	2.3	6.7	8.0	8.1	-0.6	5.1	4.6	3.8
Nov-03	0.7	1.6	1.1	-2.7	-2.8	1.6	-5.4	-1.4	0.9
Dec-03	1.8	2.1	9.8	8.1	2.4	7.3	1.8	12.0	3.8
Jan-04	5.4	-1.7	-5.8	-1.0	-4.0	-3.7	-1.4	-5.7	-1.2
Feb-04	-5.1	1.0	0.0	2.8	1.7	-1.8	0.7	6.7	-0.1
Mar-04	-1.2	-0.8	1.4	-6.0	4.3	-3.6	-14.4	-1.0	-0.8
Apr-04	0.5	6.0	-1.8	5.6	-5.0	4.7	28.3	-0.2	3.4
May-04	-0.9	0.0	2.0	-6.1	0.3	-3.1	-7.7	-8.0	-0.5
Jun-04	2.1	0.5	-1.7	1.4	3.4	3.2	1.1	0.3	0.6
Jul-04	1.2	-0.8	2.2	3.9	0.3	2.8	-1.4	7.2	0.5
Aug-04	-0.5	-4.1	-5.8	-5.1	1.5	-1.9	-2.4	-4.0	-3.5
Sep-04	2.6	6.0	5.3	5.8	-0.7	-2.9	6.0	4.7	4.9

September month-over-month percent growth

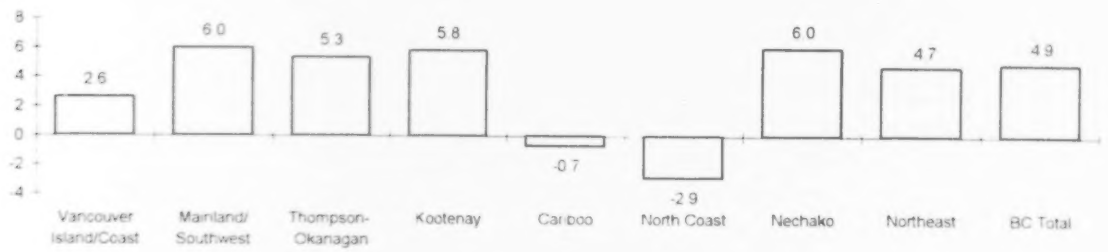


Table 2: Room Revenue by Accommodation Type ($000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			
Annual data							
1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	36,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
Annual growth rates							
1999	5.4	15.3	15.3	12.9	2.2	19.2	12.0
2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
Monthly data							
Sep-03	35,958	14,781	23,923	14,181	14,119	9,238	7,737
Oct-03	36,542	15,409	25,467	14,722	15,612	9,833	7,919
Nov-03	37,173	15,650	25,795	14,591	15,332	10,132	7,607
Dec-03	38,161	15,980	25,504	14,851	16,806	10,693	8,789
Jan-04	37,103	15,841	25,857	15,067	15,732	9,824	8,225
Feb-04	37,295	15,516	25,989	14,765	15,720	10,066	8,018
Mar-04	37,963	16,128	26,129	14,849	15,808	8,975	7,355
Apr-04	40,496	15,667	26,684	15,254	15,674	10,218	7,952
May-04	39,861	16,187	26,812	15,260	15,693	10,398	7,883
Jun-04	39,432	16,540	26,746	15,457	15,929	10,348	8,013
Jul-04	38,651	16,341	27,005	15,671	16,217	10,547	8,413
Aug-04	36,938	16,118	26,066	15,266	15,280	10,405	8,216
Sep-04	39,421	16,824	26,921	15,724	15,960	10,600	8,639
Month-over-month growth rates							
Sep-03	-3.3	-2.0	-4.8	-3.2	-4.0	-6.8	0.9
Oct-03	1.6	4.3	6.5	3.8	10.6	6.4	2.3
Nov-03	1.7	1.6	1.3	-0.9	-1.8	3.0	-3.9
Dec-03	2.7	2.1	-1.1	1.8	9.6	5.5	15.5
Jan-04	-2.8	-0.9	1.4	1.5	-6.4	-8.1	-6.4
Feb-04	0.5	-2.1	0.5	-2.0	-0.1	2.5	-2.5
Mar-04	1.8	3.9	0.5	0.6	0.6	-10.8	-8.3
Apr-04	6.7	-2.9	2.1	2.7	-0.8	13.8	8.1
May-04	-1.6	3.3	0.5	0.0	0.1	1.8	-0.9
Jun-04	-1.1	2.2	-0.2	1.3	1.5	-0.5	1.7
Jul-04	-2.0	-1.2	1.0	1.4	1.8	1.9	5.0
Aug-04	-4.4	-1.4	-3.5	-2.6	-5.8	-1.3	-2.3
Sep-04	6.7	4.4	3.3	3.0	4.5	1.9	5.1

September month-over-month percent growth

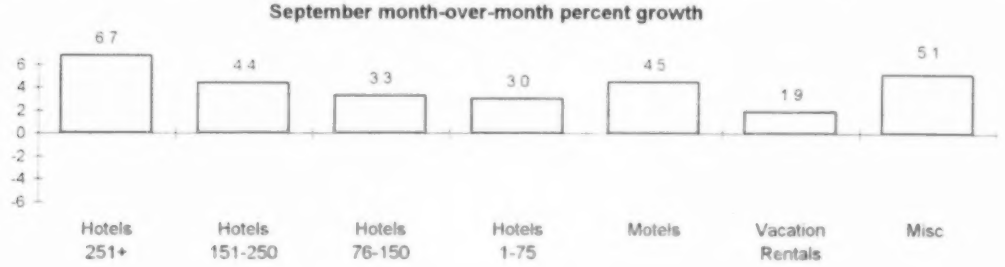


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Aug-04	Revenue ($000) YTD 04	% change from Aug-03	% change from YTD 03	Properties (#) Aug-04	Properties # chg from Aug-03	Rooms (#) Aug-04	Rooms # chg from Aug-03
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	19,943	139,846	12.6	8.6	189	1	8,449	212
Total - Hotels	16,151	113,955	11.4	9.5	68	1	5,546	205
76+ Rooms	12,464	87,556	11.5	11.2	26	1	3,937	236
1-75 Rooms	3,687	26,399	11.0	4.1	42	0	1,609	-31
Motels	1,737	12,077	9.8	1.8	29	-2	1,087	-43
Vacation Rentals	494	4,443	10.7	-4.7	29	1	373	22
19 Cowichan Valley								
Total - All accommodation types	896	6,894	0.8	2.9	36	-1	654	-10
Motels	202	1,570	6.1	7.5	16	0	315	10
21 Nanaimo								
Total - All accommodation types	4,009	31,765	9.7	5.2	79	-1	2,669	-179
Total - Hotels	2,010	15,750	11.1	6.9	20	0	1,244	-171
Motels	938	6,599	6.9	5.5	27	1	677	12
Vacation Rentals	883	7,882	11.6	3.4	21	-2	591	-18
23 Alberni-Clayoquot								
Total - All accommodation types	4,911	32,691	15.8	11.8	68	3	1,480	41
Total - Hotels	1,228	8,321	14.5	14.8	13	2	433	25
Motels	538	3,443	6.7	1.6	20	-1	405	-10
Vacation Rentals	1,799	11,436	38.7	18.8	17	4	347	71
25 Comox-Strathcona								
Total - All accommodation types	3,647	25,973	9.5	6.4	93	4	2,209	72
Fishing lodges	861	5,161	7.4	12.4	24	1	414	28
Motels	866	6,110	5.7	6.1	25	-2	691	-12
Vacation Rentals	453	3,312	30.6	7.2	25	5	280	52
27 Powell River								
Total - All accommodation types	497	3,788	21.7	43.3	19	1	358	-19
43 Mount Waddington								
Total - All accommodation types	817	4,768	-10.5	-2.3	28	0	717	-12
Total - Hotels	487	2,798	-2.1	-2.9	12	-1	538	-7
45 Central Coast								
Total - All accommodation types	344	1,723	13.0	-0.3	13	-2	174	-19
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	4,266	30,485	7.9	6.8	68	0	2,458	-31
Total - Hotels	3,041	21,593	4.4	5.8	19	-1	1,359	-21
Motels	908	6,427	9.9	9.0	37	-1	937	-25
15 Greater Vancouver								
Total - All accommodation types	69,507	517,429	12.3	10.7	245	-6	25,928	-103
Total - Hotels	65,823	486,908	12.0	10.9	162	-3	23,360	-141
251+ Rooms	35,483	266,654	10.7	11.2	25	0	9,956	0
151-250 Rooms	12,731	92,398	13.9	10.5	25	0	4,752	-1
76-150 Rooms	12,960	95,022	14.4	10.5	54	0	5,849	3
1-75 Rooms	4,648	32,834	11.1	9.7	58	-3	2,803	-143
Motels	1,938	14,135	29.1	8.2	36	-1	1,596	54
Vacation Rentals	989	6,861	6.8	11.7	20	1	584	10
29 Sunshine Coast								
Total - All accommodation types	496	3,588	3.4	10.5	24	1	406	35
31 Squamish-Lillooet								
Total - All accommodation types	7,634	147,842	22.6	-6.6	103	7	7,502	440
Total - Hotels	6,562	120,007	24.3	-5.1	47	4	5,775	388
76-150 Rooms	1,526	30,397	27.6	-1.2	15	0	1,519	0
1-75 Rooms	675	10,183	39.0	-1.2	21	3	827	116
Vacation Rentals	563	19,108	23.6	-12.0	30	3	1,240	62
Miscellaneous	314	7,233	16.9	-15.0	19	0	318	-10
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	4,113	35,463	29.1	7.6	118	-3	3,196	-157
Total - Hotels	2,016	16,987	19.7	4.8	16	0	1,063	-107
Motels	1,682	14,868	42.8	11.4	75	-4	1,774	-55
Vacation Rentals	273	2,616	33.6	2.5	15	0	263	1

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Aug-04	Revenue ($000) YTD 04	Revenue % change from Aug-03	Revenue % change from YTD 03	Properties (#) Aug-04	Properties # chg from Aug-03	Rooms (#) Aug-04	Rooms # chg from Aug-03
33 Thompson-Nicola								
Total - All accommodation types	6,077	52,805	11.2	13.8	168	-3	5,562	-20
Fishing lodges	260	1,313	4.0	-0.8	15	1	169	7
Total - Hotels	2,917	24,048	14.7	16.6	35	1	2,221	9
1-75 Rooms	616	4,965	-2.5	5.4	23	1	832	9
Motels	2,139	16,469	9.8	17.0	80	1	2,341	36
Vacation Rentals	257	7,242	4.8	7.2	19	-4	457	-31
Miscellaneous	505	3,733	4.9	3.3	19	-2	374	-41
35 Central Okanagan								
Total - All accommodation types	7,471	57,310	17.5	6.3	70	2	3,360	-94
Total - Hotels	5,167	37,283	14.8	6.5	18	0	1,706	0
Motels	1,653	11,751	18.2	4.2	30	1	1,189	-16
Vacation Rentals	394	6,193	58.0	9.3	18	1	297	-88
37 North Okanagan								
Total - All accommodation types	1,569	15,679	4.1	-2.2	49	2	1,519	-23
Motels	691	5,068	24.7	21.5	19	0	644	2
39 Columbia-Shuswap								
Total - All accommodation types	4,266	32,840	21.7	7.1	107	-4	3,251	-77
Total - Hotels	1,947	14,295	18.4	9.3	19	0	1,232	-3
Motels	1,701	11,784	24.4	7.5	49	-3	1,489	-87
Vacation Rentals	398	2,873	6.6	-0.6	12	-4	157	-41
Kootenay								
01 East Kootenay								
Total - All accommodation types	4,736	44,524	14.2	7.4	113	-13	4,530	-95
Total - Hotels	1,372	13,472	-1.7	1.7	24	-4	1,407	-112
Motels	1,402	9,454	23.0	7.3	50	-3	1,208	-38
Vacation Rentals	573	9,964	4.0	17.1	15	-6	900	35
03 Central Kootenay								
Total - All accommodation types	2,150	15,251	6.2	6.6	86	5	1,663	60
Total - Hotels	1,208	8,212	19.1	10.2	20	2	796	62
Motels	601	3,849	-19.7	-5.4	33	1	560	-28
Vacation Rentals	186	1,276	32.0	14.7	19	1	141	9
05 Kootenay Boundary								
Total - All accommodation types	633	4,996	29.3	7.8	38	-2	703	-15
Motels	462	2,832	30.2	8.8	23	-1	397	-11
Cariboo								
41 Cariboo								
Total - All accommodation types	2,119	14,128	6.3	3.4	113	-8	2,154	-107
Fishing lodges	152	685	-9.8	-4.0	16	-2	157	-11
Motels	974	7,049	6.2	3.9	34	-3	967	-123
Vacation Rentals	137	1,000	-34.2	-14.2	36	-1	345	48
Miscellaneous	242	1,274	23.7	4.4	16	-2	161	-21
53 Fraser-Fort George								
Total - All accommodation types	3,086	22,338	11.0	7.4	61	2	2,567	60
Total - Hotels	2,082	15,406	8.1	5.9	19	0	1,414	0
Motels	896	6,022	18.8	11.7	30	1	995	20
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	1,456	10,736	2.7	3.3	40	0	1,125	7
49 Kitimat-Stikine								
Total - All accommodation types	911	6,529	-1.0	8.3	41	3	893	18
Motels	323	2,311	-11.1	1.1	17	1	401	6
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	1,171	6,881	7.3	-1.3	62	-1	1,258	-58
Fishing lodges	105	406	4.1	-2.3	13	-1	78	-17
Motels	641	3,838	10.8	-3.2	27	0	702	13
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	4,060	38,585	14.8	7.1	72	3	3,571	690
Total - Hotels	2,117	18,779	27.3	23.5	23	2	1,554	110
Motels	1,223	9,209	14.9	9.0	33	0	905	-15

".." Data for regions with fewer than 10 properties reporting can not be released

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	($000)		% change from		(#)	# chg from	(#)	# chg from
	Aug-04	YTD 04	Aug-03	YTD 03	Aug-04	Aug-03	Aug-04	Aug-03
Vancouver Island/Coast	**35,063**	**247,448**	**11.5**	**8.3**	**525**	**5**	**16,710**	**86**
Victoria (C)	15,813	110,812	11.6	9.3	87	3	5,606	210
Other CRD	4,130	29,034	16.5	5.9	102	-2	2,843	2
Nanaimo (C)	2,089	15,888	12.1	7.4	24	0	1,254	10
Port Alberni (C)	527	3,155	14.0	9.2	14	1	372	-4
Courtenay (C)	830	6,522	15.0	3.8	11	0	485	0
Rest of Development Region	11,675	82,036	9.2	8.2	298	3	6,150	-132
Mainland/Southwest	**81,903**	**699,344**	**12.9**	**6.4**	**440**	**2**	**36,294**	**341**
Downtown Vancouver (C)	46,090	334,869	10.5	11.9	84	-2	12,845	-187
Other Vancouver (C)	3,978	26,550	13.4	4.8	38	-5	2,687	-122
Richmond (C)	10,056	77,927	15.9	9.7	26	0	4,342	0
Burnaby (C)	2,699	21,471	13.7	9.1	11	0	1,215	-58
Other GVRD	6,684	56,613	18.6	8.9	86	1	4,839	206
Whistler (DM)	7,007	142,403	22.7	-6.8	79	6	6,935	417
Rest of Development Region	5,389	39,512	8.9	5.9	116	2	3,431	85
Thompson/Okanagan	**23,497**	**194,096**	**17.4**	**7.9**	**512**	**-6**	**16,888**	**-371**
Penticton (C)	2,365	20,673	40.8	8.9	50	1	1,747	-117
Kamloops (C)	4,337	40,088	17.4	17.4	73	5	3,696	109
Kelowna (C)	6,637	50,820	16.4	6.3	53	3	2,786	29
Vernon (C)	1,449	14,460	1.6	-2.9	29	0	1,314	-40
Revelstoke (C)	1,380	12,090	9.2	4.8	30	-1	1,223	-50
Rest of Development Region	7,328	55,965	17.1	6.4	277	-14	6,122	-302
Kootenay	**7,518**	**64,770**	**12.9**	**7.2**	**237**	**-10**	**6,896**	**-50**
Cranbrook (C)	987	6,515	6.7	4.8	19	0	919	27
Nelson (C)	714	5,297	8.6	5.3	12	-1	425	-10
Rest of Development Region	5,817	52,957	14.5	7.7	218	-10	5,977	-77
Cariboo	**5,205**	**36,465**	**9.0**	**5.8**	**174**	**-6**	**4,721**	**-47**
Quesnel (C)	344	2,802	-3.4	4.1	13	-1	452	-24
Williams Lake (C)	539	3,798	15.6	4.4	11	-1	519	-89
Prince George (C)	2,228	16,278	9.3	5.4	32	2	1,788	60
Rest of Development Region	2,093	13,587	9.5	7.1	118	-6	1,962	6
North Coast	**2,367**	**17,265**	**1.2**	**5.1**	**81**	**3**	**2,018**	**25**
Prince Rupert (C)	1,022	6,050	4.9	4.4	17	0	780	0
Terrace (C)	460	3,665	10.0	10.7	13	2	423	38
Rest of Development Region	886	7,550	-6.4	3.2	51	1	815	-13
Nechako	**1,171**	**6,881**	**7.3**	**-1.3**	**62**	**-1**	**1,258**	**-58**
Smithers (T)	608	3,315	8.5	3.5	18	0	454	7
Rest of Development Region	563	3,566	6.0	-5.5	44	-1	804	357
Northeast	**4,060**	**38,585**	**14.8**	**7.1**	**72**	**3**	**3,571**	**690**
Dawson Creek (C)	604	5,010	8.4	17.2	13	-1	486	-9
Fort St. John (C)	1,385	15,692	34.3	17.0	20	1	1,586	93
Rest of Development Region	2,071	17,884	6.3	-2.6	39	3	1,499	606

"-" Data for regions with fewer than 10 properties reporting can not be released

Table 5: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
Annual data									
1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
Annual growth rates									
1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
Monthly data									
Sep-03	31,458	72,552	20,022	6,662	4,774	2,338	1,091	3,536	142,433
Oct-03	19,909	52,270	13,801	4,244	3,775	2,207	963	3,455	99,623
Nov-03	12,753	41,418	8,039	2,484	2,622	903	538	2,967	71,724
Dec-03	11,763	59,336	11,652	5,024	2,199	831	454	3,803	95,060
Jan-04	10,891	59,523	12,523	5,875	2,276	791	415	4,428	96,722
Feb-04	14,125	68,452	15,086	8,185	2,450	1,033	459	6,323	116,112
Mar-04	17,288	74,357	15,792	7,768	3,224	1,040	507	6,565	126,540
Apr-04	19,496	63,507	12,696	5,004	3,223	1,056	545	3,660	109,187
May-04	25,608	71,530	18,051	4,761	3,831	1,504	652	2,397	128,335
Jun-04	31,379	81,609	21,926	5,917	4,691	2,786	981	3,231	152,520
Jul-04	44,238	96,632	37,513	9,647	5,469	3,434	1,051	3,896	201,880
Aug-04	49,360	101,831	37,014	10,095	6,097	3,253	1,098	4,025	212,773
Sep-04	35,063	81,903	23,497	7,518	5,205	2,367	1,171	4,060	160,784
Year-over-year percent changes									
Sep-03	2.5	-3.8	-4.5	-7.5	-7.4	-0.6	-1.1	4.5	-2.6
Oct-03	7.0	-5.8	3.1	7.1	1.4	5.2	-6.5	8.4	-0.9
Nov-03	7.1	-0.9	7.6	0.0	-0.5	4.4	-8.1	18.7	2.1
Dec-03	4.6	0.0	12.7	13.6	6.6	27.1	3.0	70.9	4.8
Jan-04	13.9	-4.4	3.3	8.0	1.1	8.0	-6.0	10.5	-0.1
Feb-04	9.7	-5.5	11.6	12.1	8.4	6.9	-14.0	24.7	1.0
Mar-04	3.8	1.4	7.0	0.3	7.8	-7.2	-15.9	-4.2	2.0
Apr-04	5.9	14.1	6.7	15.2	1.0	5.0	7.0	4.8	10.8
May-04	4.7	11.6	10.5	1.7	1.3	4.3	-2.1	-2.2	8.8
Jun-04	9.0	17.0	2.4	5.0	4.6	6.8	5.7	12.0	11.8
Jul-04	12.4	12.2	14.1	11.6	5.8	10.7	-0.7	3.6	12.1
Aug-04	5.0	0.6	0.0	1.3	9.5	4.7	-3.8	1.2	1.8
Sep-04	11.5	12.9	17.4	12.9	9.0	1.2	7.3	14.8	12.9

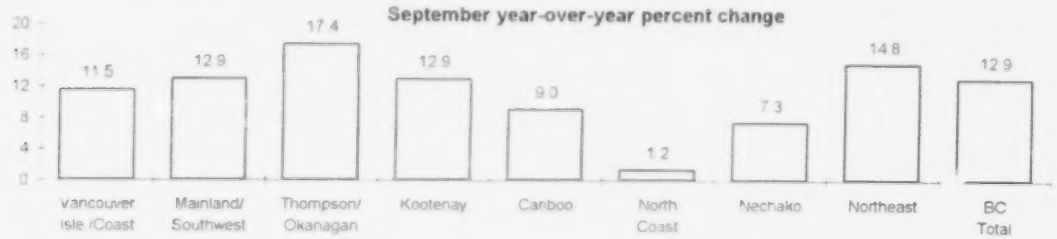


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International						
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**
Annual data								
1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
Annual percent changes								
1999	5.4	4.8	7.9	2.0	8.6	9.7	7.8	6.6
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
Monthly data								
Oct-03	613.1	509.4	216.6	295.4	103.7	51.7	33.4	10.0
Nov-03	609.2	503.6	211.0	292.4	105.6	55.5	34.1	10.3
Dec-03	612.8	504.7	209.7	293.3	108.1	56.0	34.2	11.1
Jan-04	594.5	485.0	205.1	285.8	109.5	56.3	34.3	11.8
Feb-04	600.5	489.7	206.7	287.2	110.8	56.3	35.3	10.9
Mar-04	611.0	504.8	210.5	299.7	106.2	58.2	35.2	9.1
Apr-04	625.6	509.3	210.8	301.5	116.3	62.6	35.8	11.7
May-04	627.2	503.6	205.8	300.2	123.6	64.3	38.2	13.0
Jun-04	635.1	510.6	211.8	298.6	124.5	66.5	38.4	12.8
Jul-04	629.6	509.0	211.2	297.5	120.6	58.2	40.5	12.8
Aug-04	608.9	493.5	202.7	290.9	115.5	53.8	37.6	12.5
Sep-04	647.3	529.4	204.9	307.4	117.9	56.5	39.3	12.6
Oct-04	610.0	493.2	202.3	293.9	116.8	56.7	38.5	11.6
Month-over-month growth rates								
Oct-03	0.0	-0.3	0.9	2.7	1.3	1.8	2.0	-8.6
Nov-03	-0.6	-1.1	-2.6	-1.0	1.9	7.3	2.1	2.3
Dec-03	0.6	0.2	-0.6	0.3	2.4	0.8	0.3	8.0
Jan-04	-3.0	-3.9	-2.2	-2.6	1.2	0.6	0.1	6.4
Feb-04	1.0	1.0	0.8	0.5	1.2	-0.1	2.9	-7.5
Mar-04	1.8	3.1	1.9	4.3	-4.1	3.5	-0.1	-16.3
Apr-04	2.4	0.9	0.2	0.6	9.5	7.5	1.7	27.5
May-04	0.3	-1.1	-2.4	-0.5	6.3	2.8	6.6	11.9
Jun-04	1.3	1.4	2.9	-0.5	0.7	3.4	0.4	-2.1
Jul-04	-0.9	-0.3	-0.3	-0.4	-3.1	-12.5	5.6	0.3
Aug-04	-3.3	-3.0	-4.0	-2.2	-4.3	-7.6	-7.2	-2.1
Sep-04	6.3	7.3	1.1	5.6	2.1	5.0	4.6	0.7
Oct-04	-5.8	-6.8	-1.2	-4.4	-0.9	0.3	-2.2	-7.9

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquihalla Hwy
	Total	Domestic	Trans-border	Other Int'l.	Total	Vehicles	Passengers	Passenger Vehicles
Annual data								
1999	15,807	6,314	4,170	3,373	1,191	7,852	21,369	2,388
2000	16,032	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,869	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,321	7,266	3,814	3,240	1,183	8,263	21,348	2,480
Annual growth rates								
1999	1.9	1.2	-0.1	6.4	-1.9	0.4	-0.2	0.5
2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
Monthly data								
Oct-03	1,226	622	316	287	105	691	1,773	218
Nov-03	1,255	630	325	301	104	689	1,770	197
Dec-03	1,268	644	324	300	106	645	1,676	210
Jan-04	1,252	632	321	299	104	680	1,752	197
Feb-04	1,282	662	327	293	106	709	1,818	213
Mar-04	1,277	650	328	298	102	716	1,837	222
Apr-04	1,306	654	339	313	105	714	1,869	220
May-04	1,318	659	332	328	103	702	1,821	215
Jun-04	1,326	669	324	332	103	702	1,810	213
Jul-04	1,315	672	320	323	104	705	1,819	217
Aug-04	1,298	656	327	315	100	695	1,781	207
Sep-04	1,343	684	337	322	110	709	1,830	221
Oct-04	-	-	-	-	104	713	1,846	213
Month-over-month growth rates								
Oct-03	1.2	1.6	-0.3	2.2	3.7	-0.6	-0.8	11.3
Nov-03	2.4	1.1	2.8	4.6	-1.3	-0.3	-0.1	-9.5
Dec-03	1.0	2.4	-0.3	-0.3	2.0	-6.3	-5.3	6.5
Jan-04	-1.2	-1.8	-1.0	-0.2	-1.6	5.3	4.5	-6.2
Feb-04	2.4	4.7	2.1	-2.1	1.3	4.4	3.8	8.2
Mar-04	-0.4	-1.8	0.3	1.8	-3.2	0.9	1.1	4.2
Apr-04	2.3	0.6	3.4	4.8	2.3	-0.3	1.7	-0.7
May-04	0.9	0.7	-2.3	4.8	-1.6	-1.7	-2.6	-2.5
Jun-04	0.6	1.6	-2.2	1.4	0.6	0.1	-0.6	-1.1
Jul-04	-0.8	0.3	-1.2	-2.6	0.9	0.4	0.5	2.2
Aug-04	-1.3	-2.4	2.2	-2.7	-3.9	-1.5	-2.1	-4.7
Sep-04	3.5	4.3	2.9	2.3	9.4	2.1	2.8	6.5
Oct-04	-	-	-	-	-5.5	0.5	0.9	-3.5

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel industry[2]		Consumer Price Index[1]	
	Total tounsm related	Air transport[4]	Accom-modation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%)[3]	Room Rate ($)	Traveller accom-modation	Restaurant food[4]
Annual data									
1999	181.7	15.3	29.2	110.1	27.1	61.7	112.03	133.1	115.6
2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	116.98	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.66	111.8	127.6
Annual Growth Rates									
1999	-1.5	-3.6	-0.5	0.4	-8.5	-0.2	3.1	2.4	1.5
2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.6	0.7	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-2.8	-9.9	1.8
Monthly data									
Oct-03	190.1	12.6	28.7	116.6	32.2	59.5	114.90	109.1	128.3
Nov-03	193.0	12.6	28.3	118.8	33.3	60.5	113.80	108.1	128.7
Dec-03	193.9	12.2	28.2	120.2	33.3	60.7	114.70	106.8	128.6
Jan-04	194.8	12.8	27.6	120.6	33.8	60.3	114.10	104.3	128.9
Feb-04	193.8	13.0	27.5	119.9	33.5	59.1	113.40	103.2	129.0
Mar-04	193.6	12.7	27.5	118.4	34.9	61.1	113.60	103.1	129.2
Apr-04	192.4	12.7	27.7	117.5	34.4	62.0	115.90	102.8	129.6
May-04	192.6	12.8	28.5	117.2	34.2	61.7	115.70	102.5	129.8
Jun-04	192.2	13.2	27.6	117.4	34.0	62.4	115.50	102.2	129.8
Jul-04	191.8	13.0	27.7	116.7	34.3	61.5	115.90	101.5	129.8
Aug-04	193.1	13.2	27.4	117.2	35.3	59.0	115.60	100.2	129.7
Sep-04	192.8	13.3	27.6	116.5	35.5	61.9	116.30	100.1	129.9
Oct-04	190.4	13.4	27.4	115.0	34.6	61.6	115.50	99.2	130.2
Month-over-month growth rates									
Oct-03	0.2	0.0	-1.3	1.0	-1.4	1.6	1.6	4.2	0.1
Nov-03	1.5	-0.2	-1.2	1.9	3.1	1.0	-1.0	-0.9	0.3
Dec-03	0.4	-3.5	-0.3	1.1	0.0	0.2	0.8	-1.2	-0.1
Jan-04	0.5	4.7	-2.2	0.3	1.7	-0.4	-0.5	-2.3	0.2
Feb-04	-0.5	1.5	-0.3	-0.6	-1.1	-1.2	-0.6	-1.1	0.1
Mar-04	-0.1	-1.7	-0.1	-1.2	4.5	2.0	0.2	-0.1	0.2
Apr-04	-0.6	-0.1	0.6	-0.7	-1.4	0.9	2.0	-0.3	0.3
May-04	0.2	0.7	2.7	-0.3	-0.7	-0.3	-0.2	-0.3	0.2
Jun-04	-0.2	3.2	-3.0	0.2	-0.5	0.7	-0.2	-0.3	0.0
Jul-04	-0.2	-1.5	0.3	-0.6	1.0	-0.9	0.3	-0.7	0.0
Aug-04	0.7	1.6	-1.2	0.4	2.8	-2.5	-0.3	-1.3	-0.1
Sep-04	-0.1	0.3	0.8	-0.6	0.5	2.9	0.6	-0.1	0.2
Oct-04	-1.2	1.1	-0.7	-1.2	-2.5	-0.3	-0.7	-0.9	0.2

[1]Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

[2]Source: Pannell Kerr Forster and BC Stats

[3]Occupancy Rate change expressed as percentage point change

[4] No identifiable seasonality

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns [1]					
	Receipts ($ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
Annual data						
1999	4,467.5	369.8	4,097.8	29,936.2	2,038.3	27,897.9
2000	4,831.5	358.9	4,472.6	32,136.4	2,210.4	29,926.0
2001	5,176.3	357.9	4,818.4	34,212.1	2,280.9	31,931.3
2002	5,101.2	305.9	4,795.3	35,236.9	2,241.2	32,995.6
2003	5,388.8	284.4	5,104.3	35,641.0	2,089.1	33,551.9
Annual growth rates						
1999	-3.7	-7.3	-3.4	4.3	12.9	3.7
2000	8.1	-2.9	9.1	7.3	8.4	7.3
2001	7.1	-0.3	7.7	6.5	3.2	6.7
2002	-1.5	-14.6	-0.5	3.0	-1.7	3.3
2003	5.6	-7.0	6.4	1.1	-6.8	1.7
Monthly data						
Apr-03	407	25	382	2,901	171	2,730
May-03	441	24	417	2,938	178	2,759
Jun-03	456	24	432	2,943	184	2,759
Jul-03	488	25	463	2,971	191	2,780
Aug-03	499	24	475	2,957	184	2,772
Sep-03	485	23	462	2,984	174	2,811
Oct-03	481	22	459	3,047	171	2,876
Nov-03	470	23	448	3,056	167	2,889
Dec-03	459	24	435	3,050	162	2,888
Jan-04	442	22	419	3,044	153	2,891
Feb-04	438	22	416	3,107	157	2,950
Mar-04	453	22	431	3,118	156	2,961
Apr-04	488	25	463	3,136	160	2,976
Month-over-month growth rates						
Apr-03	1.8	8.7	1.3	-1.1	3.2	-1.3
May-03	8.4	-2.3	9.1	1.3	4.0	1.1
Jun-03	3.4	1.5	3.5	0.2	3.0	0.0
Jul-03	7.0	3.5	7.2	1.0	3.9	0.8
Aug-03	2.1	-4.4	2.5	-0.5	-3.5	-0.3
Sep-03	-2.8	-4.7	-2.7	0.9	-5.8	1.4
Oct-03	-0.7	-4.1	-0.6	2.1	-1.4	2.3
Nov-03	-2.2	3.2	-2.5	0.3	-2.5	0.5
Dec-03	-2.5	3.6	-2.8	-0.2	-2.9	0.0
Jan-04	-3.7	-4.9	-3.6	-0.2	-5.5	0.1
Feb-04	-0.9	-1.4	-0.9	2.1	2.4	2.0
Mar-04	3.4	-0.8	3.7	0.4	-0.4	0.4
Apr-04	7.7	14.0	7.3	0.6	2.3	0.5

[1]Source: Statistics Canada & BC Stats.